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<td>Jessica Jiminez</td>
<td>Modified week 3 billing agenda</td>
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Week 1: System & Admin Set-up and Front Office

A. System & Admin Set Up

Day 1:

1. Defining a Providers Work Schedule
   - Working Hours
   - Recurring working hours
   - Visit types
   - Visit Type rules
   - Rule sets
   - Blocking Schedules

2. Admin Set up
   - Visit types durations
   - Visit status codes
   - Appointment reason codes
   - Patient Demographics
   - Configure demographics mandatory field
   - Configure visit rules

3. Set up Dictionaries
   - Pharmacy
   - Referring Physician
   - Zip codes
   - Lab Companies

4. Adding New Staff Members

5. Add New Providers

6. Local (machine specific) Settings and User Settings

7. Merge Patients

B. Front Office

Day 2:

1. Patient Management
   - Creating Patients
   - How to Create a New Patient in the Database
     - How to fill Out a New Patient’s Demographics
     - How to Create a New Patient with a relative Already in the Database
2. Inactivating Patients
   - Inactivating patients
   - How to mark a Patient deceased

3. How to Merge Patients Accounts

4. How to Delete a Patient

C. Appointment Scheduling
   1. Booking Appointments
      - How book an appointment for an existing patient
      - How to book an appointment for a new patient
      - How to check for documents an outstanding balance
      - How to change the co-payment for a visit
      - How to mark an appointment as non-billable
      - How to create new appointments in other ways

2. Searching for Open Appointment Slots

3. Canceling, Rescheduling, and No-shows
   - How to cancel an appointment
   - How to reschedule an appointment
   - How to move multiple bookings at once
   - How to document a no-show

4. Checking Patients In at the Front Office
   - How to check a patient in at the Front Office
   - How to scan a drivers license or Insurance card with a Mediscan Device
   - How to scan a bubble sheet
   - How to link an appointment with an incoming referral
   - How document Motor Vehicle Accident/Worker’s Comp related Appointments
   - How to scan patient documents at the front office check in

5. Checking Patient Out at the Front Office
   - View physician orders
   - Follow-up appointment
   - Collect a co-pay
   - Print receipt and appointment card
   - Outgoing referral (optional)
   - Change a patient status to Check out (CHK)
   - Print a visit summary for a patient

6. Creating Referrals
   - Create an incoming referral
   - Create an outgoing referral
   - Link referrals to an appointment
Day 3:
- Cancel an appointment
- Process an appointment with a patient no show
- Make an appointment that overbooks a time slot
- Copy and paste an appointments
- Block out a set of time slots
- Find the number of appointments for each day (a provider specific schedule)
- Print a providers schedule
- Find the patients next and last visit (Hub)
- Print a letter to a patient
- Display a log of the letters sent to a patient
- Create a new letter
- Upload a changed template
- Using labels with a dymo printer (optional)
- Merge two patients record into one record

Day 4:
- Creating a new telephone encounter
  - How to address and assigned encounter
  - How to forward an assigned encounter
  - How to create encounters in multiple ways
- Responding to a telephone encounter
- Refilling a telephone encounter prescription request
- Conducting a virtual visit with a patient
- Ordering a Lab test result with out an office visit
- Look up a patient’s telephone encounter
- Reviewing patient encounter reports
- Composing and sending a new message
- Reading and replying to a message
- Deleting a message

7. Document Management
- Changing scanning options
- Scanning paper documents and attaching them to a patient record
- Moving and deleting scanned documents with in folders
- Create a new folder to hold documents
- Add a local document or image to a patient folder
- Reviewing Documents
- Fax inbox
- Fax outbox
- Ecliniforms

Day 5:
- Creating a new bubble sheet
- Edit an existing bubble sheet
- Scanning a bubble sheet at check in
- Using a bubble from a tablet pc
- Adding a category to ecliniforms
- Adding a document to ecliniforms
- Inking an ecliniforms document
- Attaching an inked document to a patient record
- Marking a document as reviewed
- Assign an incoming fax to a staff to a staff member or provider
Week 2: EMR: Electronic Medical Records  (Nurse/Provider)

A. EMR: Electronic Medical Records

Day 1:

1. **Overview of Progress Note**
   - Types of Progress Notes
   - Format the Progress Note
   - Test scenarios (strep throat)
   - Working with current medications
   - Adding custom medications
   - Adding medications to the custom Rx database
   - Adding prescriptions to other categories
   - Linking Rx to molten Rx
   - Entering medical history
   - Entering allergy information
   - Entering gin history
   - Entering ob history
   - Entering family history
   - Social history
   - Entering vitals

2. **Entering Immunizations**
   - Set up Immunizations
   - Set up Immunization forms

3. **Using the Review of System (ROS)**
   - Entering HPI
   - Entering examinations
   - Entering physical therapy assessments
   - Entering an assessment
   - Set up CPT explosion codes
   - Link CPT codes ICD-9

Day 2:

1. **Entering Treatments**
   - Using the dosage calculator
   - Entering procedures
   - Entering diagnostic imaging
   - Entering lab/ lab reports
   - Entering preventive medicine
   - Entering visit codes
   - Entering procedure codes
   - Using the chart based EM Coder
   - Using the time based EM Coder
Entering billing notes
Entering follow-up recommendations

2. **Customizing Progress Notes**
   - Progress note templates

**Day 3:**

1. **Configure and Copy progress note categories**
   - Configure progress note categories
   - Copy progress note categories
   - Other progress note options
   - Eclinisense
   - Medical summary
   - Visit summary
   - Electronic signatures on progress notes
   - Locking progress notes
   - Progress notes print/fax/lock preferences

3. **Out of office visits**
   - Configure vitals
   - Configuring progress notes headings (XSL)
   - Using consult notes
   - Formatting progress notes
   - Specialty forms
   - Using Super Bills
   - Using lab request forms

4. **About Alerts**
   - Health maintenance alerts
   - Creating immunizations alerts
   - Creating lab alerts
   - Creating diagnostic imaging/X-ray alerts
   - Creating diagnosis specific alerts
   - Accessing and displaying patient alerts
   - Using the reminders window
   - Creating patient specific alerts
   - Suppressing and alert
   - Global alert
   - Setting global alerts
   - Accessing and viewing patient’s global alerts
   - Setting a patients default alert color

**Day 4:**

1. **Flowsheets**
   - Flowsheet manager

2. **Add/ change a lab company**
   - Link CPT codes to labs, diagnostic imaging and immunizations
   - Maintaining the laboratory dictionary
Day 5:

1. **Diagnostic Imaging**
   - Overview of Diagnostic Imaging
   - Maintaining the diagnostic imaging dictionary
   - Adding a new diagnostic image procedure
   - Adding diagnostic imaging company codes or ids
   - Updating an imaging procedure in the library

2. **Ordering an X-ray**
   - Reviewing imaging results
   - Reviewing results from imaging companies
   - Viewing all results for a patients
   - Reconciling results
   - Reviewing results from and in house procedure
   - Patient recall
   - Lookup encounters
   - Prescription log

3. **Ecliniforms**
   - Adding category to ecliniforms
   - Adding a document to ecliniforms
   - Inking an ecliniforms document
   - Attaching an inked ecliniforms document to a patient record
   - Ecliniforms document
   - Faxing
   - Previewing faxes
Week 3: Billing

A. ECW Billing

Day 1 AM:
1. Overview of billing band
2. Facility setup
3. Facility group setup
4. Provider setup
5. Resource setup
6. Insurances setup
7. Capitation setup
8. Insurance groups

Day 1 PM:
1. Set up: Provider number by facility
2. Setting up fee schedules
3. Setting up CPT groups
4. Reviewing Icd9 codes
5. Setting up Icd9 groups
6. Reviewing Modifiers
7. Setting up Adjustment codes
8. Review and setup Billing message codes
9. Set up CPT explosion codes
10. Set up Cpt/icd9 combination rules
11. Set up Claim edits
12. Review and set up Misc. options

Day 2 AM:
1. Clearinghouse/emdeon setup
2. Running claims IPE from the claims window
   - Create a claim from an encounter
   - Scrub a claim
   - Claim error messages
   - Set the claim status to ready to submit
   - Create a batch of claims
   - Submit a claim batch to a clearinghouse
   - Print a claim batch report
   - Process a claim for HFCA Printing

Day 2 PM:
1. Out of office encounters
2. Creating claims from claims screen
3. Downloading clearinghouse reports
4. Working rejections from clearinghouse
5. Creating claims without an appointment

Day 3 AM:
1. Posting patient payments at check in/out
2. Posting patient payments received after the appointment
3. Posting pat. Payments at the CPT level
4. Set up patient statements
5. Generating a patient statement

**Day 3 PM:**
1. Insurance payments
2. ERA process
3. Refunds
4. Review patient statements

**Day 4 AM:**
1. Billing alerts
2. Billing alert recalls
3. Daily reports: all inside eCW reports (excluding RVU)

**Day 4 PM:**
1. Collection management
2. APL reports
3. RVU reports

**Day 5:**
1. HCFA alignment
2. User logs
3. Reviewing and q&a
Week 4: Self Study: TESTING WEEK

A. Topics

1. Responsible for:
   - Patient Portal
   - Ob Flowsheet
   - Midmark devices
   - Eprescriptions