

# *PowerSoftMD* Training 1

## Session 1

1. Computer Basics
  - \_\_\_ a. Monitor, System Unit, Keyboard, & Printer
  - \_\_\_ b. Compare the Keyboard to that of a typewriter.
  - \_\_\_ c. Cover Windows Start Up and Shut Down.
  - \_\_\_ d. Cover Work Stations Start up and Shut Down Sequence.
  
- \_\_\_2. Talk about turning Power Off
  
- \_\_\_3. Start Up PowerSoftMD and cover Sign In User ID and Password.  
Single Click and ENTER is OK
  
- \_\_\_4. Use Advanced Utilities and Set Up User Names.
  
- \_\_\_5. Describe Primary Menu Options and Aids.
  
- \_\_\_6. Cover Sample Files Activation and Real Files.
  
- \_\_\_7. Discuss how to Exit *PowerSoftMD*, X and Logout.
  
8. Select Adding New patients.
  - \_\_\_ a. Discuss how you don't need to capitalize!
  - \_\_\_ b. Cover Setup of Defaults.
  - \_\_\_ c. Use Zip Code List.
  - \_\_\_ d. User Referral Option Button.
  - \_\_\_ e. Click on and Changing all or part of a data field
  - \_\_\_ f. Review Referring Doctor Look Up
  - \_\_\_ g. Show Insurance Carrier Information
  - \_\_\_ h. Cover Referral Authorizations
  
9. General Information Screen.
  - \_\_\_ a. Discuss the Screen layout.
  - \_\_\_ b. Show how to use the cursor movement and editing keys.  
\_\_\_ Right Tab \_\_\_ Left Tab \_\_\_ Enter \_\_\_ Mouse
  - \_\_\_ c. Help Top Menu Icon.
  - \_\_\_ d. Discuss all Data Fields
    - \_\_\_ Add name and address information
    - \_\_\_ Explain how to enter Resp Acct number for dependents.
  - \_\_\_ e. Explain the uses of all the Buttons, making sure that they know Pressing SAVE Icon is not required.
  - \_\_\_ f. Discuss UnDo Toolbar option.

- 9. General Information Screen, continued.
  - \_\_\_ g. Show how to find patients by:
    - \_\_\_ Account Number \_\_\_ Name List \_\_\_ Any other General Field
  - \_\_\_ h. Use Change Screen Button and Direct One Click Buttons.
  
- 10. OVERVIEW POSTING VISITS
  - \_\_\_ a. Discuss split screen, all Data Fields
    - \_\_\_ Use Help Toolbar Icon
  - \_\_\_ b. Show how to Post Charges
    - \_\_\_ CPT Code Double Click                    \_\_\_ Shorthand Code
    - \_\_\_ CPT Codes List                                \_\_\_ Diagnosis Codes
  - \_\_\_ c. Show how to Post Payments
  - \_\_\_ d. Show how to Post Adjustments
  - \_\_\_ e. Select to print a RECEIPT.
  - \_\_\_ d. Note Data Fields updated by Posting and Receipt options:
    - \_\_\_ General Information Screen
  
- 11. POSTING INSURANCE PAYMENTS
  - \_\_\_ a. Date of Service
  - \_\_\_ b. Assigning to Charges
  - \_\_\_ c. Adjustments
  - \_\_\_ d. Comments
  
- 12. Go to the LEDGER SCREEN.
  - \_\_\_ a. Data areas, and Scrolling.
  - \_\_\_ b. Deleting an entry
  - \_\_\_ c. Making Corrections
  
- \_\_\_ 13. Primary Menu – How to change a patients' name, including historical list of names.
  
- \_\_\_ 14. Print a Super Bill or Work Ticket
  
- \_\_\_ 15. Print a Patient Information Form
  
- \_\_\_ 16. Daily Reports
  - \_\_\_ Audit \_\_\_ Day Sheet \_\_\_ Bank Deposit \_\_\_ Schedule Cross Reference
  
- \_\_\_ 17. Cover daily, weekly, and monthly Back Ups.

# *PowerSoftMD* Training 2

## Session 2

### Review:

1. Adding New Patients
2. Posting Charges, Payments, Adjustments
3. Making Ledger Corrections
4. Printing Daily Reports
5. Review Back Up procedures

### New Topics:

1. Utility Menu
  - a. Company Name and Address
  - b. Adjustments Code Updates
  - c. CPT Fee Schedule Updates
  - d. Insurance Carrier Updates <-----
2. Entering Patient Insurance Information
  - Insurance Primary and Secondary
  - Insurance Details
3. Printing Insurance Claims
  - Individual  Batch
  - HCFA Forms  Plain Paper
4. Electronic Insurance
5. Insurance Reporting
  - Daily Log  Not Submitted  Overdue Claims  Historical Log
6. Patient Quick Forms
  - Quick Forms
  - Super Bills
  - Work Tickets
7. Referral Tracking
8. Computer Back up Review

# *PowerSoftMD* Training 3

## **Session 3**

1. Employee Time Clock
  - a. Defining Employees
  - b. Timing In and Out
  - c. Corrections
  - d. Time Reports
  
2. Scheduling
  - a. Moving up and down through the Schedule
  
  - b. Changing Dates in the Schedule
    - Next, Prev  Calendar  Graph
  
  - c. Scheduling Existing Patients finding patient first
  
  - d. Scheduling Existing patients finding the Time Slot first
  
  - e. Moving Appointments
  
  - f. Canceling Appointments
  
  - g. Brand New Patients
  
  - h. Finding a patients list of appointments
  
  - i. Printing; Schedules, Telephone Confirmation reports, etc.
  
  - j. Customizing the Schedule
    - Day & Column Names
    - Schedule Service Codes
    - Setting Scheduling Options
  
  - k. Blocking Time
    - By Characters /.\*\=
    - By Color
    - By Services
    - By Model Days

### 3. Message Center

- \_\_\_ a. Setting Up User IDS
- \_\_\_ b. Creating Pop Up Lists for messages and responses
- \_\_\_ c. Moving message to the responsible message box
- \_\_\_ d. Saving messages
- \_\_\_ e. Storing message into patient chart

# *PowerSoftMD* Training 4

## **Session 4**

- \_\_\_ 1. Finance Charges
- \_\_\_ 2. Printing Statements
- \_\_\_ 3. Tracking Insurance, Non Submitted, Aging
- \_\_\_ 4. Tracking Patient Payments, aging.
- \_\_\_ 5. Mail Merge, collection letters.
- \_\_\_ 6. Management Overview Reporting.

# *PowerSoftMD* Training 5

## **Session 5**

### **Electronic Medical Records “EMR”**

- 1. How to access patients' Electronic Chart
- 2. Customizing Folder Names
- 3. Setting up Habits and Allergies List
- 4. Patient Profile Screen
- 5. Vital Signs Folder
- 6. Documents folder
  - a. Customize Folder Headings
  - b. Scan, view, and print documents
  - c. Import documents
  - d. Move documents between folders
  - c. Export documents
- 7. Images folder
  - a. Importing images
  - b. Viewing images
  - c. Printing images
- 8. Treatment folder
  - a. Entering Notes
  - b. Viewing Message Center messages
  - c. Printing notes

### **SOAP Notes**

- 1. Customizing Medications
- 2. Creating Pop Up Lists, including Categories
- 3. Creating Shorthand Definitions
- 4. Creating Templates
- 5. Entering Soap Notes

SOAP Notes continued:

- 6. Printing Soap Notes
- 7. Printing and faxing Prescriptions
- 8. Printing referral letters
- 9. Viewing Soap Note History "View All"
- 10. Patient Cover Sheet
- 11. Creating Diagrams