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Basics

- Logging In, Logging Out, User Security
- Adding New Patients from Primary Menu and Scheduling
- Setting up Add Defaults and Zip Codes
- Review General Information screen, including flags

Scheduling Basics

- Setting up Scheduling Options
- Schedule Service Codes
- Model Days or Schedule Templates
- Moving through the schedule
- Adding New Patients from the Schedule
- Scheduling Existing and New Patients

Scheduling Advanced

- Viewing a Week at a Time
- Multiple schedules
- Schedule Reporting

Patient Ledgers

- Posting Charges and Co-Payments
- Posting Insurance and Patient Payments
- Correcting posting mistakes
- Ledger displays and reports

Insurance Claims

- Printing Claims
- Submitting Electronic Claims
- Tracking Claims

Patient Billing

- Individual statements
- Family statements
- Paper vs Electronic Statements
- Collection follow up reporting

Reporting

- Daily reports
- Monthly reports
- Practice Analysis reports

Patient Communications

- Recall Cards and Email
- Recall Reporting
- Quick form letters
- Scheduling Appointment Email reminders

Message Center

- Creating messages
- Message shorthand
- Moving message to the responsible person
- Storing messages on the patient's electronic chart

Electronic Medical Records Basics

- Patient Profile, Allergies, Meds Regimen
- Vital Signs
- Customizing the profile and documents pages
- Scanning and Importing documents

Electronic Medical Records Advanced

- Creating and updating SOAP Notes, patient visit notes
- Creating and Customizing Templates and Shorthand
- Voice Data Entry
- Prescriptions Paper

eScripts – Electronic Prescriptions

- Registration
- Installation & Setup
- Basic Training

Advanced

- Patient Photos via Web Cam
- Clinical Photos importing & Editing
- Advanced Reporting