Template

HSMS MICROMD

Meeting Minutes |Project Management Plan
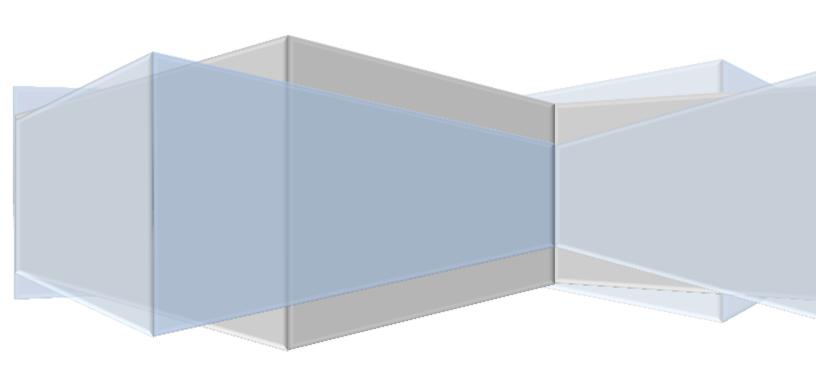
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Purpose

The Project Management Plan is a critical document for identifying the scope, constraints, goals and objectives, assumptions, deliverables and governance for key success factors. It also serves as a contract between the project sponsors and the project team.

Project Overview

What is MicroMD?

MicroMD PM is a full-featured, easy-to-learn practice management system with reliable performance and scalability. MicroMD PM Supports electronic claims management, accounts receivable management, patient registration and scheduling, reporting and more.

MicroMD EMR is an intuitive electronic medical record system with streamlined encounter capture, multiple charting methods, e-Prescribing, medical device connectivity, E and M coding, outcomes reporting and more

MicroMD DMS is a user-friendly document management system with electronic document annotation, customized and configurable document display settings.

Methodology Overview

Initiation >> Planning >> Installation/Execution>> Training >> Go Live

Initiation Phase:
- Financing Secured
- Sales Contract Signed
- Project approved by sponsor

Planning Phase:
- Conduct Introductory/Kickoff Conference Call
- Determine Software Setup
- Begin enrollments/credentialing for claim submission (If applicable)
- Determine interface/ device interface availability (If Applicable)
- Review (PM and/or EMR) Conversion Requests and defining objectives(If Applicable)
- Create Project Charter Draft
- Provide Hardware Specification
- Complete Clearinghouse enrollments
- Determine if existing hardware/peripherals are compatible with MicroMD (If applicable)
- Determine if bandwidth/hardware are compatible with MicroMD Cloud (If applicable)
- Extract Data files (If applicable)
- Interface Development (If applicable)
- Identify the implementation Practice Management champion from the practice
- Identify the implementation Electronic Medical Records champion from the practice.
- Complete and Approve Project Charter t Plan Document
- Obtain Sponsor/Stakeholder signatures to execute project.

Installation/Execution Phase:
- Installation of Hardware.
- Installation of Software.
- Installation database in the cloud (If Applicable)
- Complete the installation of MicroMD client on workstations and/or Terminal Server(s)
  - Install MicroMD PM+EMR Scanning Device(s)
  - Install Dragon Naturally Speaking for Dictation (If applicable)
  - Setup MicroMD Patient Portal (If applicable)
  - Setup MicroMD Patient Portal (If applicable)

Training Phase:
- Training will be performed as outlined in the scope of work.

Goals and Objectives- Practice Management

Some of the objectives below will be emphasized during the implementation of **MICROMD PRACTICE MANAGEMENT** to ensure the top goals for the organization are addressed.

MicroMD Practice Management offers scheduling, patient information, billing, integrated EDI solutions, advanced reporting, 5010 electronic claim file formatting and much more.

Scheduling: Manage appointments with ease and precision
- ➢ Intelligent waiting lists and alerts with real-time eligibility
- ➢ Integrate your MicroMD PM software with Demandforce to automate marketing and patient communications with guaranteed results.

Registration: Capture and manage patient data efficiently
- ➢ Powerful task management of recalls and referrals
- ➢ Temporary registration for new patients
- ➢ Scan driver's license and insurance cards

Billing: Simplify billing and accelerate payment
- ➢ Enhanced charge slips tracking and charge posting
- ➢ EDI Rules Manager and code scrubbing
- ➢ EMR integration for fully-automated charge capture
- ➢ Quick, accurate payment posting options
- ➢ Easy statement generation
- ➢ ICD-10 ready

Reporting: Gain operational and financial insight
- ➢ Dynamic management, financial and administrative reports
- ➢ RBRVS Reporting
- ➢ Hundreds of reporting options

Advanced Security: Control system access for peace of mind
- ➢ Customizable access management and security
- ➢ Audit trail maintenance

Systems Integration and Interoperability: Expand your practice management options
- ➢ Interfaces for and integration with Word, Excel and more
- ➢ Connectivity with leading lab services, clearinghouses, automated telephone reminder systems and more

Goals and Objectives- MicroMD EMR

The following objectives will be emphasized during the implementation of **ELECTRONIC MEDICAL RECORDS** to ensure the top goals for the organization are addressed.

MicroMD Electronic Medical Records software helps practices and health centers eliminate unnecessary paper, improve clinical productivity and enhance care for your patients

- ➢ Simplify detailed code searches and quickly assign codes with ICD-10 functionality

- ➢ Save time with Two-way patient-to-practice communications

- ➢ See all of our methods of Clinical Documentation

- ➢ Improve medication safety, enhance workflow and save time with e-Prescribing

- ➢ Legally write prescriptions for controlled substances, reduce drug abuse, drug diversion and "doctor shopping" with MicroMD EPCS Gold

- ➢ View your patient's most pertinent data at once with Clinical Dashboard

- ➢ Save pictures, clinical images and anatomical diagrams with Image Management and Annotation

- ➢ Manage your workload on your own terms with Desktop Management

- ➢ Control system access for peace of mind with Security Features

- ➢ Customize your EMR with ease with Specialty Content

- ➢ See clinical data from medical devices in real time with Device Connectivity

- ➢ Explore a range of features and benefits with Integration and Interoperability

Contract

<Modify accordingly to the contract>>

0	**Product Purchased-** (Practice Management & Electronic Medical Records)
0	**Implementation Type:** **Cloud Setup-** MicroMD databases are installed in the cloud and are accessed through a web portal. **Client Server-** MicroMD databases are installed on a client server and the application is accessible locally.
0	**Data Conversion: (PM | EMR)-** *The transfer of data from a 3rd party system to MicroMD*
0	**Clearinghouse- (PM)-** *Billing claim submission*
0	**PM+ Insurance Card/License Scanner** *(Enables user to scan driver/insurance cards)*
0	**PM Training-**
0	**EMR Training-**
0	**EMR+ Document Scanner** (Enables users to scan documents)
0	**Custom Reporting (PM)-** *Third-party tool such as Crystal Reports can easily interface to the database for custom queries and reporting.*
0	**[1] E-Statements	[2] Online Payments** 1 Integrated print and electronic patient statement processing and delivery services. 2 Enables patients to pay online with a debit or credit card with auto posting of payments directly into MicroMD PM.
0	**Interface to 3rd Party System** *Has the ability to interfaces with a range of third-party services and integrates with a variety of complementary technologies to export data to a third party system.* **** A Fee may be applicable for this service**
0	**Laboratory Interface (EMR) |** **Other: ---->** *** Sends electronic lab orders and receive the electronic results ****This request must be approved by the lab before setup is performed by HSMS*
0	**Device Integration (EMR)-** EKG, Spirometry, vital sign equipment, etc. **Other:_____** Connectivity to digital devices (approved by HSMS) that provides direct input of results into MicroMD EMR

0	**Immunization State Registry Interface (EMR**)-
	Other: _____
	     Has the ability to Interface with vaccine registries.
	
	Patient Portal- (Meaningful Use Bundle)- (EMR)
	Other: _____
	     A secure online website that gives patients convenient 24-hour access to personal health information from anywhere with an Internet connection.

NO	**Topaz Signature Device (EMR)-** Enable you to sign, send, and store documents electronically without the need to print or scan
NO	**Dragon Naturally Speaking (EMR)** Power Mic_____ Integrates with Dragon Medical's speech recognition software. The system utilizes the Microsoft voice-to-text engine and uses the SAPI interface.
NO	**Interfax- (EMR) [In= ; Out+]** A web integrated fax engine, which allows faxing of prescriptions and medical referrals directly from MicroMD EMR to any fax destination.
0	**E-Backup- (EMR)** A web based integrated backup solution provided by HSMS MicroMD

Statement of Work

Project Scope

General Overview:

CLIENT ABC is a referral from Client ABC and has elected to start submitting claims as of **4.1.2016.** This request is contingent based on the information recorded in this document and be evaluated to accommodate the request. The practice has 1 location with a total of 5 Physicians, which 2 are concurrent users.

The requirements for a success GO LIVE with both products is to have MicroMD EMR proficient with sending charges back to PM for billing. Within the timeline allotted, NOT all of the EMR software training components will be completed but will be properly planned per the activities in the training agenda.

Software Deployment Phase

Overview:

CLIENT ABC has elected to split the databases between two locations. The Practice Management database will be installed at "*Client ABC* and the MicroMD EMR database will be installed at "*CLIENT ABC*. All of the users from CLIENT ABC will connect to the EMR database server locally.

Please note- this setup will impact some of the software functionality and is not the preferred setup method by HSMS-MicroMD. The functionality of this setup will be discussed more in detail prior to the training beginning.
This setup will require a VPN tunnel from PBC to *CLIENT ABC for PM+EMR to communicate.*

Dragon Naturally Speaking (Setup):

The software must be installed on 2 devices prior to scheduling training.

Conversion Phase: (Optional- No Contract on file for this SOW)

Overview:

CLIENT ABC has elected to convert **Patient demographics & Referring providers** from Software Vendor. No data conversion will be performed for Electronic Medical Records. However, the practice will be demonstrated how to manually migrate the data into MicroMD EMR.

The vendor and/or practice's IT Consultant is expected to extract the data files in HSMS-MicroMD preferred format- (CSV). If the files are not extracted in the preferred method, this will delay the timeline. Upon receiving the data files, a trial conversion will be performed within the approved timeline and a prototype will be developed.

The converted data will be reviewed by MicroMD Practice Management training team to validate the data. The trial data will require validation before moving to the next phase. If there are any discrepancies found; HSMS will attempt to resolve the reported issues in a timely manner. After the data files have been approved; HSMS project manager will coordinate the GO LIVE with the practice and training team, schedule the final data extraction/conversion and installation of the database.

Practice Management Training Phase

The blank practice management blank database will be setup by Pre-Billing Consultants and/or MicroMD Practice Management trainer.

In addition to the EMR training, the Samaritan staff is going to enter charges for additional providers that are hospital specific and will not use the EMR.

Action Items

> ➢ **Obtain who's responsible for the database setup**
> ➢ **Who from CLIENT ABC is going to need PM training?**
> ➢ **Who is performing the PM training? HSMS- Training team or PBC?**

Electronic Management Training Phase

>> **32 hours of webinar, (Train the Trainer)**
>>
>> ➕ <u>**Train the Trainer**</u>**- Requires a (Super User) at the practice to undergo the full training curriculum and is responsible for demonstrating the software functionality to the staff.** *All of the training sessions will be recorded for future use. (Additional training can be purchased at any time)*

<mark>**<<OUTLINE TRAINING SPECIFICS>>**</mark>

All of the trainings will be conducted via webinar through go-to-assist. The training hours will be broken into 2-3 segments, until the 15 hours are completed.

A high level of the Electronic Training is explained on the next page of this document. A detailed plan will be provided when training is scheduled. The assigned super user will fulfil these training session.

<u>**Action Items**</u>

>> ➢ **Obtain training milestones**

Dragon Naturally Speaking (Training)

Once the software has been installed, the providers & assigned super user must undergo the following training session to setup their profiles and learn how to dictate. *It is critical the physicians allocate time for this training.*

- User Profile Setup
- Basic dragon commands
- Setting up Macros
- Dictating the dragon within MicroMD

The two main providers will use a wizard with all note documented on subjective as text – rename to Visit Note or similar – with Dragon Macros using **cloud workflow due to remote locations with AMP steps and a clinguide for AMP. It was suggested that they create a generic CLIENT ABC that will auto load with all PQRS choices they need and MFU codes they need – and a generic AMP selection. They can also develop additional AMP cliniguides as needed. The other providers will use the same wizard – but with typing, text encounters and quick text instead of Dragon.

Interfax

This service will be setup when the GO-LIVE is determined. The practice must register the e-service and provide information such as – Name, Practice info, area code and undergo email validation, which should be specific to this account. After the registration is completed, the setup and training will be performed.

MicroMD Practice Management

Practice Management (PM) Training Phase:

The training plan is an intricate phase of the total project. The success of a system implementation greatly depends on a high quality, comprehensive training program. A comprehensive training program ensures that system users are prepared to conduct business and treat patients effectively and efficiently using MicroMD at go-live.

The complete system-training curriculum will be divided into 3 phases and planned so that each group's individual curriculum matches the expertise required for their job functions. Therefore, each audience group should be trained on a specific set of training modules.

- **Big Picture (Optional)**
  The Big Picture training is a **quick demo/ overview** of MicroMD Practice Management. It gives the staff a quick look into how the product works. This demonstration is performed before the trainings are executed and typically helps the staff understand the product and enables them to engage with the training team for a successful implementation.

- **Phase I – Involves setting up the application such at a HIGH LIVEL as the following:**
  - Creating Providers
  - Practice
  - Appointment Template
  - Charge Slip Creation
  - Practice Preferences
  - Identity and Access Management (addition of users)
  - System Preferences
  - System Classes
  - Rules Manager
  - Auxiliary (Third Party, Collection, etc.)
  - Utility (Change password, mail merge documents, etc.)

- **Phase II – Upon completing this phase of training, the practice will be considered "LIVE" (Fully functional and using the system. This training will consist the following topics:**
  - Creation of Maintenance Tables,
  - Charge Slips, Charge Entry, and Posting Co-pays.
  - Diagnosis, Patient, Procedure, Plans
  - Employers, Referring Doctors, Explosion codes, Service Facilities
  - Miscellaneous (Contact manager, Day Sheet, Task Manager, etc.)
  - Creating Appointments/Scheduling Appointments
  - Billing & Claims Processing

- **Phase III – Post Go Live-** Discuss such topics as EDI Follow-up/Claims Submission, Posting Payments, Statements, Reports and Collections. At this point, your implementation will be considered complete and your employees will be considered "certified users" and will be issued certificates. They will then be registered with our support department as such and will be able to call in with support issues.
  - Reviewing and assisting Statements & Billing
  - Posting Primary Payments
  - Sending Secondary Claims
  - Continued support via web training and troubleshooting
  - Continued Training of Billing System
  - Reports and Administration Review
  - Weekly Conference calls to review outstanding issues and questions.
  - Certification of Users

MicroMD Electronic Medical Records

Electronic Medical Records (EMR) Training Phase

The training plan is an intricate phase of the total project. The success of a system implementation greatly depends on a high quality, comprehensive training program. A comprehensive training program ensures that system users are prepared to conduct business and treat patients effectively and efficiently using MicroMD at go-live.

The complete system-training curriculum will be <u>divided into 4 phases</u> and planned so that each group's individual curriculum matches the expertise required for their job functions. Therefore, each audience group should be trained on a specific set of training modules.

- **Big Picture**

  The Big Picture training is a <u>quick demo,</u> or <u>overview </u>of the PM and/or EMR. It gives the staff a quick look into how both products works. This is performed before the trainings are performed and typically helps the staff understand the product and enables them to engage with the training team for a successful implementation.

- **EMR Manager-**
  The EMR Manager Training is needed to set up practice-specific preferences and users for the EMR.

- **Workflow Assessment –**
  - Define the goals and objectives of the practice and every aspect of the practices daily routine.
  - Determine the flow of patients through the practice and to gain a good understanding of the practice processes.
  - Obtain documentation from the practice that will be used for the preparation of the customization Template creation.
  - Configure the EMR Manager Setup- (Setting up users credentials to access the application)

- **Customization-**
  Using the documentation gathered from the workflow assessment, the trainer will assist the appropriate clinical staff member at the client site on editing the standard content that is provided with the system to aid in the creation of customization

- **Phase I**
  This includes areas such as the following:
  - Setting up folder structures in the Document Management System (DMS),
  - Creating Common Lists
  - Setting up User Preferences
  - Setting up Appointment Book
  - Setting up Desktop Overview
  - Communications (Phone Messages, Internal Mail, Reminders)
  - Demonstrate how to E-RX and fulfil requests
  - Scheduled Visits
  - Setting up Attachments
  - Setting up Chart demographics
  - Setting up Medical Information
  - Setting up Medications
  - Template
  - Alerts
  - Allergies

  Phase II- At this point, your implementation will be considered complete and your employees will be considered "certified users"
  - This part of the implementation process includes the training of providers to use the encounters and Templates.
  - Final training will include completing progress notes and entering additional patient medical information; this includes medical history, health maintenance, etc.

==MILESTONES ESTABLISHED==

Milestone	Start Date	Resource

Training Activities listed- here

**IF ALL DATES HAVE BEEN ESTABLISHED; PUBLISH A PROJECT PLAN OUTLINING THE ACTIVITIES | RESOURCES| DUE DATES

ACTION ITEMS

SOFTWARE DEPLOYMENT				
SUMMARY	**DESCRIPTION**	**DUE DATE**	**COMPLETION**	**RESOURCE**
DOCUMENT SCANNER	**PURCHASE OF DOCUMENT SCANNER OF EMR**			
INSURANCE CARD INSTALLATION	**INSTALLATION OF (2)INSURANCE CARDS**			

PRACTICE MANAGEMENT TRAINING				
SUMMARY	**DESCRIPTION**	**DUE DATE**	**COMPLETION**	**RESOURCE**
NOTIFY BILLING SERVICE	**NOTIFY EXISTING BILLING SERVICE TO CHANGE VENDOR'S FOR CLAIM SUBMISSION SETUP,**			
PM TRAINING	**OBTAIN REMAINING PM TRAINING AGENDA**			

MICROMD EMR TRAINING				
SUMMARY	**DESCRIPTION**	**DUE DATE**	**COMPLETION**	**RESOURCE**
EMR CLINICAL CHAMPION	OBTAIN AN EMR CLINICAL CHAMPION			
OBTAIN EMR TRAINING AGENDA	SCHEDULE A CONFERENCE CALL WITH CLINICAL CHAMPION AND EMR TRAINING TO CREATE TIMELINE			
EMR- GO LIVE	Determine the rollout for EMR GO LIVE			

Introductions

Key Team Members

Henry Schein- MicroMD Resources

Name	Position/Organization	Email Address	Phone Number
Michael Smith	MicroMD Project Manager		
Mike Esposito	MicroMD PM Trainer		
Anna Mrvelj	MicroMD EMR Trainer		
Christopher Sanders	MicroMD Lead Technician		
Carrie Ambrose	Support Manager, MicroMD		
Kristen Heffernan	General Manager, MicroMD		

TEMPLATE Resources

Name	Position/Organization	Email Address	Phone Number
ABC CLIENT	Office Manager, ABC CLIENT	<CLIENT@EMAIL.COM	330.758.8832

Project Organization

Team Roles & Responsibilities

Role	Individuals	Responsibility
Practice Champion		- Serves as the link between the project team and the staff - Gives perspective on system and workflow approaches - Influences staff that project is very important to organization - CEO, Administrator, Office Manager, etc.
Super User		- Participates in Super User training sessions - Responds locally to physician needs, filter issues, and then define any matter that is escalated - Co-conducts initial training classes with MicroMD trainers and solo conducts classes in secondary phases of multi-phase rollout projects - Conducts additional training classes for physicians as needed
"Practice Management Champion" aka- Super User		- Participates in Super User training sessions - Responds locally to physician needs, filter issues, and then define any matter that is escalated - Co-conducts initial training classes with MicroMD trainers and solo conducts classes in secondary phases of multi-phase rollout projects - Conducts additional training classes for physicians as needed
"Electronic Medical Records Champion" aka- Super User		- Participates in Super User training sessions - Responds locally to physician needs, filter issues, and then define any matter that is escalated - Co-conducts initial training classes with MicroMD trainers and solo conducts classes in secondary phases of multi-phase rollout projects - Conducts additional training classes for physicians as needed
IT Consultant		- Manages hardware installation and maintenance - Manages system software installation - Performs network management - Performs capacity planning - Provides support and maintenance of application systems - Administers the data security and control procedures
Project Manager		- Key contact for all implementation communications - Tracks and addresses program/project issues & action items - Manages and tracks detailed project plan - Organizes and facilitates regular project status meetings - Coordinate user resources - Communicates regular project status reports to key stakeholders
PM Trainer		- Participates in initial onsite workflow evaluation - Coordinates and conducts all PM end user training - Supports users during PM go-live and post-implementation phase
EMR Trainer		- Conducts data collection and onsite workflow interviews - Develops the workflow plan in conjunction with project team leads - Facilitates the configuration of the database - Develops the EMR training plan in conjunction with project team leads - Coordinates and conducts physician, Super User and regular user training - Supports users during EMR go-live and post-implementation phase

Support

Support Services Overview

Henry Schein-MicroMD support services begin immediately after the software has been installed. Any issues that occur during the implementation process can be addressed to the assigned project manager, assigned trainer or a support technician. These issues will flow through the Support Center for escalation, to ensure the problem has been documented and resolved.

The Support Center can be reached by the methods below.

When is Support Available?

*** MicroMD Client Support

Phone
Dial 330-758-8832
- **Extension- 2 for Practice Management and extension**
- **Extension- 3 for the Electronic Medical Support.**

Email
- **Hsms.support@henryschein.com (Monitored from 8-5 EST)**

Fast Chat
- **http://www.micromd.com/help/** (Select Live Chat)

After Hours Support
- **Until 8:00 EST M-F**
- **8:00AM EST-2:00PM EST on Sat.**

Other Services

Knowledge Base Forum

The site allows users of MicroMD to access training videos, tutorials, forums, etc.

- **http://www.micromd.net/ (Must register to obtain access)**

My Voice

The site allows users of MicroMD products to enter, vote on, and view the status of requests from customers to improve and enhance the MicroMD software. Enhancements with the highest votes on a quarterly basis are reviewed for inclusion in the next Major Version Release

- **http://micromd.uservoice.com/forums/165396-myvoice-for-micromd**

Appendix- PM Training Activities

PM Training Phase 1-Web Training	2 hrs.	Date	Attendees	Notes
Setup - Master Table		9/1/2016		
Setup - Miscellaneous Preferences		9/1/2016		
Setup - Practice Preferences		9/1/2016		
Setup - Identity and Access Management (create users)		9/1/2016		
Setup - System Classes/Categories		9/1/2016		
Setup - System Preferences		9/1/2016		
Rules Manager		9/1/2016		
Charge Slip Creation		9/1/2016		

PM Training Phase 1-Web Training (Billing Staff)	2 hrs.	Date	Attendees	Notes
Maintenance – Diagnosis-Include Mapping		9/6/16		
Maintenance - Employer		9/6/16		
Maintenance - Explosion Codes		9/6/16		
Maintenance - Practice		9/6/16		
Maintenance - Provider		9/6/16		
Maintenance - Referring Doctor		9/6/16		
Maintenance - Service Facility		9/6/16		
Maintenance - Zip Code		9/6/16		
Maintenance – Procedure (Including Payment & Write Off Codes)		9/6/16		
Maintenance – Plan (including Payer ID's)	9AM PST/12PM EST	9/6/16		
Maintenance – Patient	9AM PST/12PM EST	9/6/16		

Detail, Plan Sets, Cases, Notes, Contacts		9/6/16		

Appendix- PM Training Activities Continued

PM Training Phase 1-Web Training (Front Office Staff)	2 hrs.	Date	Attendees	Notes
Maintenance – Patient	N/A	N/A	N/A	
Detail, Plan Sets, Cases, Notes, Contacts, Responsible Party	N/A	N/A	N/A	
Create Appointment Templates (Day, Week, Provider week setup)	N/A	N/A	N/A	
Scheduling Patients	N/A	N/A	N/A	
Appointment Module Complete	N/A	N/A	N/A	
PM Training Phase 1-Billing Staff Web Training	**2 hrs.**	*Date*	**Attendees**	*Notes*
Review of Previously covered Material	N/A	N/A	ALL STAFF	
Miscellaneous - All	N/A	N/A	ALL STAFF	
Utilities	N/A	N/A	ALL STAFF	
Windows	N/A	N/A	ALL STAFF	
Help	N/A	N/A	ALL STAFF	
PM Training Phase 1- Web Training (Front Office Staff)	**2 hrs.**	*Date*	**Attendees**	*Notes*
Review of Previously covered Material	N/A	N/A	(Front Office Staff)	
Miscellaneous - All	N/A	N/A	(Front Office Staff)	
Utilities	N/A	N/A	(Front Office Staff)	
Windows	N/A	N/A	(Front Office Staff)	
Help	N/A	N/A	(Front Office Staff)	
PM Training Phase 2 Front Office GO LIVE	**2 days**	*Date*	**Attendees**	*Notes*
Maintenance - Patient	N/A	N/A		
Detail, Plan Sets, Cases, Notes, Contacts, Responsible Party	N/A	N/A		
Card Scanning	N/A	N/A		

		Date	Attendees	Notes
Printing Charge Slips	N/A	N/A		
Appt Views	N/A	N/A		
Check In/Check Out	N/A	N/A		
Appt. Confirmation	N/A	N/A		
Appt. Reports	N/A	N/A		
Scheduling	N/A	N/A		
PM Training Phase 2 cont'd Front Office GO LIVE (Onsite)	**2 days**	*Date*	*Attendees*	*Notes*
Misc>Day Sheet Date Select	N/A	N/A		
Posting Co-pays, Patient Payments	N/A	N/A		
Balancing Day Sheet	N/A	N/A		
PM Training Phase 2- Billing Training (Onsite)	**1 day**	*Date*	*Attendees*	*Notes*
Misc>Day Sheet Date Select	N/A	N/A		
Posting Charges, Co-pays, Patient Payments	N/A	N/A		
Balancing Day Sheet	N/A	N/A		
EB Claim Processing	N/A	N/A		
Paper Claim Processing/align claim forms	N/A	N/A		
Posting Primary Payments	N/A	N/A		
Posting/ Sending Secondary Claims	N/A	N/A		
Charge and Payment Adjustments/Refunds	N/A	N/A		
PM Training Phase 3-Post Go Live	**2 hrs.**			
Complete Billing Menu				
Auto Payment Posting	N/A	N/A		
Statements/Billls	N/A	N/A		
Reporting	N/A	N/A		
Aux→Collections	N/A	N/A		
Weekly Status Call 1	**0.5 hrs.**			
Weekly Status Call 2	**0.5 hrs.**			
Weekly Status Call 3	**0.5 hrs.**			
Weekly Status Call 4	**0.5 hrs.**			
Review Training Agenda	**0.5 hrs.**			

Transfer To Software Support Call	**0.5 hrs.**			
Certification of Users	**0.5 hrs.**			

PM Training Phase 1-Web Training (Front Office Staff)	2 hrs.	Date	Attendees	Notes
Maintenance – Patient				
Detail, Plan Sets, Cases, Notes, Contacts, Responsible Party				
Create Appointment Templates (Day, Week, Provider week setup)				
Scheduling Patients				
Appointment Module Complete				
PM Training Phase 1-Billing Staff Web Training	**2 hrs.**	*Date*	*Attendees*	*Notes*
Review of Previously covered Material				
Miscellaneous - All				
Utilities				
Windows				
Help				