

WEBEX CLASSES

Listed in Suggested Order for New Clients
Ophthalmology/Optometry

Note: All 8.1 Classes are Available As Recorded Sessions Only
Other classes that are recordings only are indicated below

Also we have made suggestions as to who in the office would benefit the most from taking each class. These are ONLY suggestions as we realize each office is unique and the needs for training will vary per office.

Rev. 1.7

1. PREPARING FOR IMPLEMENTATION (Onsite & Webex) **Available In Recording Only** – The Administrator and all staff who will be meeting with the trainer during implementation
2. COMPULINK 101 – All staff
3. V8.1 OV (Good for review for those still on V8.1) **Available In Recording Only**
All applicable staff
4. V9.0 OV (For those upgrading or new to V9.0) – All staff

APPOINTMENTS

5. APPOINTMENT SCHEDULING SETUP **Available In Recording Only** – The staff member(s) responsible for creating and maintaining the appointment templates
6. APPOINTMENT SCHEDULING OVERVIEW **Available In Recording Only** – All staff

TABLES

7. COMPULINK 101 BASIC TABLE SETUP **Available In Recording Only** – The staff member(s) responsible for maintaining tables
8. UNDERSTANDING FINANCIAL TABLES **Available In Recording Only** – The staff member(s) responsible for maintaining tables

LEDGERS

9. LEDGER POSTING I **Available In Recording Only** – Charge Entry Staff – Optical Staff – Billing
10. LEDGER POSTING II **Available In Recording Only** – Charge Entry Staff – Optical Staff – Billing
11. UNDERSTANDING LINE ITEM POSTING – Charge Entry Staff-Optical-Billing
12. COLLECTION TRACKING (V9.0) **Available In Recording Only** – Billing staff

SPECTACLE RX

- 13. CUSTOMIZATION AND UTILIZATION OF SPECTACLE RX SCREEN Available In Recording Only** – Optical Staff
- 14. RX JOB COSTING SETUP** – The staff member(s) responsible for maintaining tables
- 15. INVENTORY SETUP** – Staff member(s) responsible for entering and maintaining inventory
- 16. INVENTORY MANAGEMENT AND REPORTS Available In Recording Only** – Staff person(s) responsible for maintaining inventory
- 17. DME JOB COSTING SETUP Available In Recording Only** – Optical Manager & the staff member(s) responsible for maintaining tables

CL RX

- 18. MANAGING YOUR CL INVENTORY/CL RX FORM Available In Recording Only** – CL Staff /Techs
- 19. NON-INVENTORY CL SETUP/CL RX FORM Available In Recording Only** – CL Staff/Techs

INSURANCE

- 20. COMPULINK 101 INSURANCE BILLING** – Billing Manager – Billing Staff
- 21. NEICANSI/Emdeon Billing Enrollment (V9.0)** – Billing Manager – Billing Staff
- 22. NEICANSI/Emdeon Billing Setup & Functionality (V9.0)** – Billing Manager – Billing Staff
- 23. NEICANSI/Emdeon Billing Batch Submittal & Reports (V9.0)** Billing Manager – Billing Staff
- 24. NEICANSI/Emdeon and Direct Carrier Auto Remittance Posting (V9.)** – Billing Manager – Billing Staff
- 25. NPI OV (V9.0) Available In Recording Only** – Billing Manager – Billing Staff
- 26. TESTING NPI ONLY (V9.0) Available In Recording Only** – Billing Manager – Billing Staff
- 27. CLAIM VALIDATION SETUP Available In Recording Only** – Billing Manager – Billing staff
- 28. PQRI Available In Recording Only** —Billing Manager – Billing Staff

VSP

- 29. GETTING ALONG WITH MR. VSP- Available in Recording Only!** (For those **NOT** using Eyefinity Interface) – Optical Manager – Optical Staff – Staff member(s) responsible for setting up and maintaining VSP tables
- 30. RECONCILING VSP EOB Available In Recording Only** – Staff member(s) responsible for reconciling VSP EOB
- 31. EYEFINITY (VSP) INTERFACE Available In Recording Only** – Staff member responsible for setting up the interface – Optical Staff

REPORTS

- 32. CRYSTAL FINANCIAL REPORTS Available In Recording Only** - Staff member(s) responsible for running reports in their own individual areas
- 33. CRYSTAL GENERAL/ADMIN/ANALYSIS REPORTS Available In Recording Only** - Staff member(s) responsible for running reports in their own individual areas
- 34. CRYSTAL RX REPORTS Available In Recording Only** - Staff member(s) responsible for running reports in their own individual areas

ELECTRONIC HEALTH RECORDS –

- 35. IMPLEMENTING ELECTRONIC HEALTH RECORDS (EHR) (V9.0)**
Doctors/Techs
- 36. ELECTRONIC HEALTH RECORDS OVERVIEW (EHR) (V8.1) Available In Recording Only** - Doctors/Techs
- 37. ELECTRONIC HEALTH RECORDS (EHR) SCREENS (V8.1) Available In Recording Only** Doctors/ Techs
- 38. ELECTRONIC HEALTH RECORDS (EHR) TABLES (V9.0)** Doctors/Techs (if responsible for tables)
- 39. ELECTRONIC HEALTH RECORDS (EHR) OV I (V9.0)** Doctors/Techs
- 40. ELECTRONIC HEALTH RECORDS (EHR) OV II (V9.0)** (Prerequisite: ELECTRONIC HEALTH RECORDS (EHR) OV I) **Available In Recording Only**
Doctors/Techs
- 41. V8.1 TO V9.0 ELECTRONIC HEALTH RECORDS (EHR) BRIDGE Available In Recording Only** Doctors/Techs (Only for clients upgrading from V8.1 to 9.0 Electronic Health Records (EHR))

OTHER

- 42. FUNCTIONS (RECALL/TODO/REFERRAL THANK YOU LETTER) –**
Administrator & Staff Member(s) responsible for these functions
- 43. GL/AP WITH QUICKBOOKS INTERFACE Available In Recording Only –**
Accountant, Administrator
- 44. INTEGRATING MICROSOFT WORD WITH YOUR COMPULINK ADVANTAGE SOFTWARE Available In Recording Only –** Staff member(s) responsible for creating letters or any other word processing documents
- 45. QUERY Available In Recording Only –** Administrator & Staff Member(s) responsible for running queries
- 46. SCREEN BUILDER I (V9.0) –** Staff member(s) responsible for creating and maintaining screens
- 47. SCREEN BUILDER II (V9.0)** (Prerequisite: Screen Builder I) **Available In Recording Only** - Staff member(s) responsible for creating and maintaining screens

- 48. SCREEN BUILDER III (V9.0)** (Prerequisite: Screen Builder I & II) **Available In Recording Only** Staff member(s) responsible for creating and maintaining screens
- 49. CUSTOMIZING SCREENS (DEMOGRAPHIC)** (Prerequisite Screen Builder I) **Available In Recording Only** – Administrator & any other staff member(s) responsible for maintaining screens
- 50. INTRODUCTION TO PRINT DESIGNER (V9.0)** (Prerequisite:Screen Builder I/II & III) **Available In Recording Only** - Staff member(s) responsible for creating and maintaining screens
- 51. SMART FIELDS I (V9.0)**-(Prerequisite: Screen Builder I & II) **Available In Recording Only** -Doctors/Administrators and others responsible for areas where Smart Fields can be be used such as EHR,Spec RX, CL RX and Patient Demo screens
- 52. SMART FIELDS II (V9.0)** –(Prerequisite: Screen Builder I & II and Smart Fields I) **Available In Recording Only** -Doctors/Administrators and others responsible for areas where Smart Fields can be used such as EHR, Spec RX, CL RX and Patient Demo screens
- 53. MANAGING YOUR ACCOUNTS RECEIVABLE I** **Available In Recording Only** – Billing Managers and Administrators
- 54. MANANGING YOUR ACCOUNTS RECEIVABLE II** **Available In Recording Only** – Billing Managers and Administrators
- 55. FORM EDITOR** **Available In Recording Only** – Staff member(s) responsible for creating forms
- 55. TABLE MAINTENANCE POST TRAINING** **Available In Recording Only** – Staff member(s) responsible for maintaining tables
- 56. XML WORD 2007 INTEGRATION** **Available In Recording Only** – Staff member(s) responsible for specifically creating Electronic Health Records (EHR) documents utilizing information held in sub tables (grids) in V9.0 Electronic Health Records (EHR).