SYNOPSIS OF WEBEX CLASSES
OPHTHALMOLOGY & OPTOMETRY
Note: All V8.1 Classes Are Available As Recorded Sessions Only
Other classes that are recording only are indicated below.
Rev. 1.8

APPOINTMENT SCHEDULING SETUP - Available in Recording Only Learn how successful appointment scheduling relies on the proper setup of your appointment templates. An overview of templates by Reason/Category/and Times Only will be shown. You will learn how to build your Appointment Schedule using the templates by duplicating by week/calendar/or through batch create.

APPOINTMENT SCHEDULING OVERVIEW- Available in Recording Only
Prerequisite: It is suggested but not required that you take the Appointment Scheduling Setup class prior to attending this class. This class will demonstrate how to schedule by appointment edit and appointment search /reschedule/cancel and confirm appointments. All views of the appointment scheduler will be shown as well as how to utilize the appointment wait list. The multiple and continue features will be shown as well.

CLAIM VALIDATION SETUP - Available in Recording Only Claim Edit Error Logic is a tool that may be used to check a patient's insurance claim file for data errors. This logic is designed to help you catch errors before claims are processed and to minimize claim rejections.

COLLECTION TRACKING (V9.0) - Available in Recording Only Learn how to use the new feature Collection Tracking in V9.0 which is only available in the Line Item Accounting Environment. This feature is used to work past due accounts or to establish payment plans. Collection tracking is **ONLY** available to clients using Line Item Accounting.

COMPULINK 101 – This class covers the basic functions of the software – Logging into the system/demographic screen review/keyboard vs. mouse/adding new patient/ referral info/recall/and how to make an appointment. This is a beginner's class for those new to Compulink or new employees of existing clients.

COMPULINK 101 – GENERAL TABLE SETUP- Available in Recording Only
Learn how to get started with table setup in your Advantage Product. In this class you will learn how to set up all tables under the general category except for the Appointment Types and Appointment Status tables as these are covered in our Appointment Scheduling Setup Class.

COMPULINK 101 INSURANCE BILLING – A class designed to help you gain an understanding of the basics of insurance billing. You will learn the relationship between fields in the Advantage Product and the CMS 1500 and UB04 insurance forms. Excellent class for those unfamiliar with insurance billing.

CRYSTAL FINANCIAL REPORTS - **Available in Recording Only** A review of all Crystal Financial Reports that are available within Compulink's Advantage Software without installation of the Crystal Reports program. The Advantage Program is delivered with a Crystal component and report files so that you do not need to purchase Crystal Reports to run these reports. This is not a class in which you will learn how to create or edit existing crystal reports.

CRYSTAL RX REPORTS - **Available in Recording Only** A review of all Crystal RX Reports that are available within Compulink's Advantage Software without installation of the Crystal Reports program. The Advantage Program is delivered with a Crystal component and report files so that you do not need to purchase Crystal Reports to run these reports. This will not include reports that are including with our inventory classes. This is not a class in which you will learn how to create or edit existing crystal reports.

CRYSTAL GENERAL/ADMIN/ANALYSIS REPORTS - Available in Recording Only A review of all Crystal General/Admin/Analysis Reports that are available within Compulink's Advantage Software without installation of the Crystal Reports program. The Advantage Program is delivered with a Crystal component and report files so that you do not need to purchase Crystal Reports to run these reports. This will not include reports that are including with our inventory classes. This is not a class in which you will learn how to create or edit existing crystal reports.

CUSTOMIZING DEMOGRAPHIC SCREENS - **Available in Recording Only**
Custom screens by Login ID is a feature used to customize the appearance and content of screens throughout the patient area. Learn how to customize the demographic screens through a combination of three elements – Screen Layouts/Scroll Definition Files/and Individual Scroll Files in V8.1.
In the 9.0 class you will learn how to use the new tool Screen Builder to modify the existing screens.

CUSTOMIZATION AND UTILIZATION OF THE SPECTACLE RX SCREEN- Available in Recording Only Learn how to customize your spectacle rx screen to fit your practice needs. A demonstration will be given on how to fill out the spectacle rx screen and use it to post the spectacle charges to the ledger utilizing the job costing area of the software.

DME JOB COSTING SETUP. - Prerequisite: Requested but not required – RX Job Costing Class - Available in Recording Only In this class you will gain an understanding of the special programming in the Advantage software to support the separation of claims for durable medical equipment between Medicare and DMERC

ELECTRONIC HEALTH RECORDS (EHR) OVERVIEW (V8.1) – Available in Recording Only A demonstration of how to use the EHR to add and secure patient medical records, auto-post charges to the ledger based upon the level of examination provided, store images and instrument readings as well as how to scroll a history of specific examination findings.

ELECTRONIC HEALTH RECORDS (EHR) SCREENS (V8.1) – **Available in Recording Only** Learn how to create and/or customize the existing electronic health records screens making them more applicable to your practice.

ELECTRONIC HEALTH RECORDS (EHR) OVERVIEW I (V9.0)-Prerequisite: It is not required but STRONGLY SUGGESTED that the Electronic Health Records (EHR) Tables Class be taken prior to this class. –Learn the functionality of the Electronic Health Records (EHR) in our newest version. This will be a demonstration of how to use EHR to add and secure patient medical records as well as auto-post charges to the ledger based upon the level of examination provided. A more in-depth demonstration of the Electronic Health Records will be given in the Electronic Health Records (EHR) Overview II Class. This class is a pre-requisite for the Electronic Health Records (EHR) II Class.

ELECTRONIC HEALTH RECORDS (EHR) OVERVIEW II (V9.0)-Prerequisite: Electronic Health Records (EHR) Overview I Class. It is not required but STRONGLY SUGGESTED that the Electronic Health Records (EHR) Table Class be taken prior to this class. - **Available in Recording Only** This class is a continuation of the Electronic Health Records (EHR) Class in which you will further enhance your knowledge on how to use EHR to add and secure patient medical records, store images as well as instrument readings and scroll a history of specific examination findings.

ELECTRONIC HEALTH RECORDS (EHR) TABLES (V9.0) –In this class you will gain an understanding of the two different table areas (EHR & Custom) in the software associated with the Electronic Health Records (EHR) and the functionality of each table.

EXAM POSTING LOGIC (V9.0)—Prerequisite**: EHR OV I, EHR OV II, Screen Builder I** - **Available in Recording Only** This class will help you to gain an understanding of how the Exam Charge Posting Utility works and learn how to create logic for Exam Posting from the medical records to your patient's ledger.

EYEFINITY (VSP) INTERFACE – **Available in Recording Only** A PowerPoint presentation of the Eyefinity (VSP) Interface including Setup, Eligibility, Authorization and Internet Claim Submittal for VSP providers thus eliminating the need for double entry.

FORM EDITOR- **Available in Recording Only** Learn the many uses of this tool that allows the design of custom output by controlling placement of printed information on the screen. Learn how to create forms to print on a blank page as well as how to create forms to fill in the blanks on printed pages.

FUNCTIONS: RECALL 101/TODO/REFERRAL THANK YOU LETTERS: - An overview of these three functions available in the Advantage Product. **Recall** – A function used to notify patients that it is time to schedule a visit to the office. **ToDo** – This is used to post action items or reminders to your office staff to perform tasks related to a patient. **Referral Thank You Letters** – A function that lets you generate personalized letters thanking your patients or outside professionals for referring new patients to your office.

GETTING ALONG WITH MR. VSP- Available in Recording Only -A basic class on how setup and posting to VSP (Vision Service Plan) is unique within the Advantage program. A review of the tables involved in the setup and processing of VSP patients in the software. This class does not cover the Eyefinity Interface process.

GL/AP AND QUICKBOOKS INTERFACE- Available in Recording Only An overview of how to set up AP/GL accounts within the Advantage Software in order to be able to interface with QuickBooks. A PowerPoint will be shown illustrating the interface with QuickBooks.

IMPLEMENTING ELECTRONIC HEALTH RECORDS (V9.0 EHR) - **Available in Recording Only** A power point presentation outlining technical/logistical/rollout/ workflow/old chart/& training considerations to be made during the process of implementing electronic health records. Customization and modification of screens as well as equipment interfacing is also discussed in this class.

INTEGRATING MICROSOFT WORD WITH YOUR COMPULINK ADVANTAGE SOFTWARE - **Available in Recording Only** Learn how to successfully integrate Microsoft Word with the Advantage Software. After configuring this interface, when you click WP or select the Word Processing icon from any screen, Microsoft Word opens instead of the -internal Word Processor. Mail-merge operations and printer controls will be handed off
to Microsoft Word.

INTRODUCTION TO PRINT DESIGNER- **Available in Recording Only**
Prerequisite: Screen Builder I/ Screen Builder II/ & Screen Builder III- In this class you will learn how to use the Print Designer which is a tool for generating printouts of the custom screen layouts throughout the Patient area of your Advantage Program. It has been designed to simplify the process of converting screen layouts to print layouts.

INVENTORY MANAGEMENT & REPORTS (OPTICAL & MISCELLANEOUS)
Available in Recording Only – Learn how to use inventory to optimize inventory control in your practice. Maintain a continual inventory of all items to be sold to patients, or used in the office. Automate inventory ordering and receiving and even have vendor invoices automatically post to Accounts Payable. Know what you have on hand, what needs to be ordered and what is currently on order at any given time. An overview of all inventory reports.

INVENTORY SETUP – Learn how to setup your inventory utilizing Frames Fax Data as well as manually. Inventory setup of blank lenses as well as miscellaneous will also be demonstrated in this class.

LEDGER POSTING I– **Available in Recording Only** This class will focus on how co pays and pay percentages affect how a charge is calculated. A thorough discussion on how to enter charges from the ledger screen using the service and material command as well as Mult, SALT and Batch. There will be discussion on how to track patient visits and create multiple claim sets.

LEDGER POSTING II- **Available in Recording Only** This class will cover a discussion of all remaining ledger commands not covered in the Ledger Posting I class as well as examples of options available under the print command. All topics under the options command will also be covered in this class.

MANAGING YOUR ACCOUNTS RECEIVABLES I-- **Available in Recording Only** The objective of this webex training class is to learn how to efficiently utilize Compulink's Advantage Software to manage your entire accounts receivable (including insurance receivables). This class is a prerequisite for Managing Your Accounts Receivables II.

MANAGING YOUR ACCOUNTS RECEIVABLES II-: **Available in Recording Only** The objective of this webex training class is to further learn how to efficiently utilize Compulink's Advantage Software to manage your entire accounts receivable (including insurance receivables) by running, reading and working our reports as well as utilizing specific tools within the software. This is a continuation of Managing Your Accounts Receivable I class.

MANAGING YOUR CL INVENTORY/CL RX FORM- **Available in Recording Only -** Learn how to use inventory to optimize inventory control in your practice. Maintain a continual inventory of all contact lenses to be sold to patients, or used in the office. Automate inventory ordering and receiving. Know what you have on hand, what needs to be ordered and what is currently on order at any given time. An overview of all contact lens inventory reports. In this class you will also learn how to utilize the CL RX form as well as how to customize the form to your practice needs.

NEICANSI/EMDEON and DIRECT CARRIER AUTO REMITTANCE POSTING – Learn how to set-up, retrieve and post Electronic Remittance Advices (ERA's) from Emdeon's clearinghouse as well as from insurance carriers billed direct electronically.

NEICANSI/EMDEON BILLING ENROLLMENT(For Clients Not Currently Enrolled With Emdeon-In this class you will learn the benefits of billing your insurance claims electronically, be introduced to the Emdeon claims clearinghouse and learn how the enrollment process works.

NEICANSI/EMDEON BILLING SETUP AND FUNCTIONALITY – Prerequisite, if not already enrolled: NEICANSI / Emdeon Billing Enrollment Webex Class- Learn the correct table set-up and patient data entry necessary for successful electronic claims submittal.

NEICANSI/EMDEON BILLING BATCH SUBMITTAL & REPORTS – Prerequisites: NEICANSI / Emdeon Billing Enrollment (if not already enrolled) and NEICANSI / Emdeon Billing Set-up - Learn how to: create electronic claim batches; send them to Emdeon; get error reports back from Emdeon; work error reports/rejections.

NON-INVENTORY CL SETUP/CL RX FORM- **Available in Recording Only** Learn how to set up your contacts that are not in inventory using the materials tables. This will give an overview of all tables that need to be completed in order to be able to complete the CL RX form and charge the contacts on the ledgers. A demonstration of how to customize the CL RX form will also be included. There will also be an overview of the RX sales reports in this class.

NPI OVERVIEW (V9.0) – Available in Recording Only This class will be an overview of the table changes and insurance form updates that are needed in Version 9.0 in order to be compliant with the new NPI and NPI ONLY billing requirements.

QUERY: Available in Recording Only A flexible tool used for extracting data from your Patient tables. With Query you can identify trends and facts about your practice that are not obvious on a day to day
basis. Use Query to market special services or products to patients who share a unique attribute. You may generate lists, letters, or postcards. E-mail, or forms.

PQRI- Available in Recording Only The objective of this webex training class is to provide information on the Physician Quality Reporting Initiative and the set-up and functionality in our software.

PREPARING FOR IMPLEMENTATION (Onsite & Webex): Available in Recording Only -This class will give you a clear understanding in detail of what needs to be accomplished by you prior to your implementation in order to make your training experience a success!

RECONCILING VSP EOB – Available in Recording Only Learn how to reconcile the VSP EOB using the lab account. This method allows you to cross reference an individual patient's reimbursement on the EOB with a payment on the VSP Lab account.

REVISING YOUR ELECTRONIC HEALTH RECORDS (EHR) CODES TAB-Prerequisite: Understanding Financial Tables V9.0/Screen Builder I/ Screen Builder II- Learn how to customize the EHR Codes Tab which can be used as an Electronic Super Bill in your office when posting from the EHR exam screens.

RX JOB COSTING SETUP– Spectacle RX Job Costing, also referred to as Point of Sale (POS), automates the posting of material charges from the spectacle RX screen to the patient ledger. Job Costing simplifies the posting process and, if the tables supporting this feature are completed properly, minimizes the risk of incorrect or missed charges.

SCREEN BUILDER I (V9.0): An overview of the new Screen Builder Tool used to modify and create new screens in the 9.0 version of the Advantage Software. This is a basic class where you will learn the terminology and functions of the Screen Builder Tool. Screen Builder II & III classes are being offered where you will learn how to actually modify existing screens as well as create screens, tabs, and different options on the screens and tabs such as panels, radio boxes, check boxes, grids, images, etc. You MUST take the Screen Builder I class as a Prerequisite for Screen Builder II. Screen Builder I and Screen Builder II classes are BOTH Prerequisites for Screen Builder III. A new era with Compulink that we are excited to be sharing with you!

SCREEN BUILDER II (V9.0): Prerequisite: Screen Builder I. Available in Recording Only This class will be a continuation of Screen Builder I Class. You will learn how to modify existing screens and tabs as well as create new ones. You will learn how to add panels, combo boxes, check boxes, radio boxes and other options to the tabs that you create or modify. A new era with Compulink that we are excited to be sharing with you!

SCREEN BUILDER III (V9.0):-Prerequisite: Screen Builder I & II. Available in Recording Only This is an advanced class where you will be learning more features of the Screen Builder Tool which were not covered in the Screen Builder I and Screen Builder II Classes. Images and grids will be featured in this class as well as a workshop where you will have interaction with the trainer to build a screen.

SMART FIELDS I (V9.0): Prerequisite: Screen Builder I & II. Available in Recording Only This class will help you gain an understanding of Smart Field Scripts including those that come with the software and creating your own. In this class we will be reviewing the Smart Field Scripts that come with your V9.0 Software. We will also be learning how to write basic Smart Field Script to trigger basic events of displaying a message and triggering a document to open.

SMART FIELDS II: Prerequisite: Screen Builder I & II and Smart Fields I
Available in Recording Only To gain an advanced understanding of Smart Field Scripts including those that come with the software and creating your own. In the first half of this class we will be reviewing more advanced Smart Field Scripts that come with your V9.0 Software and the second half of the class will be an interactive workshop with the trainer to build smart script.

TABLE MAINTENANCE- POST TRAINING: **Available in Recording Only**
Prerequisite: Client or Trainer Table Completion/Training Completed – This class will educate clients on proper post-training table maintenance.

TESTING NPI ONLY Electronic Claims (V9.0) - **Available in Recording Only** The purpose of this webex class is to guide you through the process of testing NPI ONLY electronic claims with your payers to ensure a smooth transition to NPI ONLY and avoid interruption to your cash flow. The testing process will be covered in detail as will common issues and how to handle them.

UNDERSTANDING FINANCIAL TABLES - **Available in Recording Only** Gain an understanding of the following tables: Financial Plans, Services, Materials, Miscellaneous, Modifiers, POS, TOS, Group Posting, CPT Code Check, Ledger Notes, Adjustments, Line Item Adjustments, Billing Messages, Tender Types, and Credit Card Companies.
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UNDERSTANDING LINE ITEM POSTING - Line Item Posting (LIP) is an optional enhancement that offers complete billing and payment history at the individual charge level. Each patient statement and insurance claim is recorded. With LIP, you control how monies received are distributed to each individual outstanding charge.

V8.1 TO V9.0 EHR BRIDGE(Only For Clients Moving From V8.1 to 9.0 Electronic Health Records)- **Available in Recording Only** This class will be a power point presentation showing the V8.1 to 9.0 EHR Conversion step by step. Each office must attend this class and sign off on the agreement before making this conversion from V8.1 to V9.0 for Electronic Health Records.

V8.1 OVERVIEW - **Available in Recording Only** An overview of our 8.1 version of the windows based program showing the features which have been added. This class is geared toward those that are upgrading or considering upgrading their current version of the software.

V9.0 OVERVIEW - An overview of our 9.0 version of the windows based program showing the features which have been added. This class is geared toward those that are upgrading or considering upgrading their current version of the software. This class does not include an overview of the Electronic Health Records.

XML WORD 2007 INTEGRATION (V9.0) **- Available in Recording Only** In this class you will learn how to set-up and use the XML Word 2007 Integration with Compulink's Advantage products; this is for specifically creating EHR documents utilizing information held in sub tables (grids) in V9.0 EHR.