

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.
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10. OVERVIEW POSTING VISITS
- ___ a. Discuss split screen, all Data Fields
 - ___ Use Help Toolbar Icon
 - ___ b. Show how to Post Charges
 - ___ CHG Code Double Click ___ Shorthand Code
 - ___ CHG 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
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11. POSTING INSURANCE PAYMENTS
- ___ a. Date of Service
 - ___ b. Assigning to Charges
 - ___ c. Adjustments
 - ___ d. Comments
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12. Go to the LEDGER SCREEN. ___ a. Data areas, and Scrolling.
- ___ b. Deleting an entry
 - ___ c. Making Corrections
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- ___13. Primary Menu – How to change a patients' name, including historical list of names.
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- ___14. Print a Super Bill or Work Ticket
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- ___15. Print a Patient Information Form
-
- ___16. Daily Reports
 - ___ Audit ___ Day Sheet ___ Bank Deposit ___ Schedule Cross Reference
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- ___17. Cover daily, weekly, and monthly Back Ups.

PowerSoftMD Training

1

Session

1

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. CHG 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