



This training syllabus is designed to prepare a practice for general use of Practice Suite. Detailed steps for specific situations can be found in the Steps and Solutions documents. At the end of Each training session users are *strongly* encouraged to use the software and review the covered topics. Subsequent trainings begin with a brief question and answer session covering topics from the prior session.

# Customization Training and Customization Checklist

1

Audience: PowerMed **powerusers** are responsible for early customization and setup. *This person is often a provider or office manager.*

Time: 1 hrs

Login and Navigation – approx. 30 min

- Desktop icon
- Module selection
- Tabs / Navigation Bar / Screens
- Dashboard
- Center Buttons
- Quit Button

Settings – approx. 30 min

- General
- Schedule
- Staff / Security
- Facility

Customization and Setup: Following Training 1, practices should be able to customize and setup the following:

- Add staff members and set user levels (Settings/Staff/Security)
- Review/edit facility information (Settings/Facility)
- Set facility letterhead (Search screen/Facility)
- Set general practice settings (Settings/General)
- Set permanent time values for Scheduler (Settings/Schedule)

Date / Initials: \_\_\_\_\_

Attendees: \_\_\_\_\_

\_\_\_\_\_

## Continued Customization Training and Customization Checklist

2

Audience: PowerMed **powerusers** are responsible for early customization and setup. *This person is often a provider or office manager.*

Time: 1 hrs

Login and Navigation – approx. 10 min

- Overview
- Q & A

Practice/Customization – approx. 1 hr

- Providers
- Medications
- Referrals
- Exam Codes
- General Codes
- Favorite Dx
- Guidelines
- Special Letters
- Tx Codes
- Orders
- Hx Codes
- ROS Codes

Optional Training

- Immunizations
- Screenings
- Health Series

Overview

- Charting Templates
- Picklists

Customization and Setup: Following Training 2, practices should be able to customize and setup the following:

EMR module

- Build provider list (set schedule sort order) (Prac/Cust/Providers)
- Update your signatures (Prac/Cust/Providers)
- Build referring list (Prac/Cust/Referrals)
- Review/edit appointment types (Prac/Cust/General Codes)
- Review/edit resources (Prac/Cust/General Codes)
- Build Favorite Dx list (Prac/Cust/Favorite Diagnoses)
- Build Exam / History / ROS lists (Prac/Cust)
- Review/edit misc general codes (Prac/Cust/General Codes)
- Add/edit practice medications library (Prac/Cust/Medications)
- Add/edit practice orders library (Prac/Cust/Orders)
- Add/edit custom drug interactions (Prac/Cust/Drug Interactions)
- Add/edit custom guidelines (Prac/Cust/Guidelines)
- Customize immunizations / screening / health series (Prac/Cust)

Date / Initials: \_\_\_\_\_

Attendees: \_\_\_\_\_

\_\_\_\_\_

## Patient Registration & Appointment Management and Customization Checklist

3

Audience: Practice **front-office personnel** are responsible for entering patient information and schedules appointments. Also recommended for powerusers and practice supervisors.

Time: 1 hr

Login and Navigation – approx. 10 min

- Overview       Q & A

Patient Registration – approx. 20 min

- Adding a patient  
 Patient/Demographic screen

Appointment Management – approx. 30 min

- Encounters  
 Adding / changing / finding appointments  
 Schedule views  
 Availabilities  
 Repeat Appointments  
 On call  
 Calendar manager  
 Printing options

Customization and Setup: Following Training 3, practices should be able to customize and setup the following:

- Patient Registration Defaults (Settings/General)
- Enter patient information (Patient/Demographics)
- Select staff member to load encounters
- Create availabilities (Schedule/Create Availabilities)
- Set on call provider (Schedule/On Call)

Date / Initials: \_\_\_\_\_

Attendees: \_\_\_\_\_

\_\_\_\_\_

## Provider Training and Customization Checklist

4

Audience: Practice **providers and clinicians** that see patients and records EMR information.

Time: 2 hrs

Login and Navigation – approx. 10 min

- Overview                       Q & A

Charting Templates – approx. 30 min

- Packages                       Soap breaks & components  
 Testing work

Patient Clinical Functions – approx. 50 min

- Intake                       Encounters  
 Summary                       Orders  
 Notes                       History  
 Diagnoses                       ROS  
 Meds / Allergy                       Exam  
 Surgery                       Health  
 Note locking                       Notes / Styling

Practice Management – approx. 15 min

- Administration                       Health

Specialty Module – approx. 15 min

- Patient/Specialty module

Customization and Setup: Following Training 4, practices should be able to customize and setup the following:

- Build templates (Prac/Cust/Charting Templates)
- Edit packages (Prac/Cust/Charting Templates)
- Picklists (Prac/Cust/PickLists)
- Note locking system (Settings/General)
- Note styling (Settings/General)
- Customize specialty module (if needed) (Practice/Specialty)

Date / Initials: \_\_\_\_\_

Attendees: \_\_\_\_\_

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