The following Webinars are presented on a recurring basis, but do require an advance enrollment. A typical outline for each Webinar is presented later in this document.

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Please fill out registration form with attendees name and email address. Fax registration form to 501-821-2817 or email to webinar@MedEvolve.com. Attention: **Implementation**
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Monday

Security: (Presented on Mondays @ 8am & 1pm CST)

- How to set up and assign security options to User groups
- How to add a new User
- How to attach a user to a group
- How to reset a password
- Explain the difference between adding rights to a user and to a group
- Explain individual security options

Table Maintenance: (Presented on Mondays @ 10am & 3pm CST)

- Account Billing
- Account Category
- How to set-up CPT Fees
- How to set up Alternate CPT fee schedules
- How to activate and inactivate ICD-9and CPT codes
- How to set up a location
- How to set up a resource
- How to set up new insurance Categories
- How to manage the provider number table

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Tuesday

Account Information: (Presented on Tuesdays @ 8am & 1pm CST)

- System/Windows Navigation
- Tool Bar, Menu Bar, Action Bar
- Accessing Account Information
- Enrolling a New Patient
- Editing an Existing Patient
- Patient Search
- Account Tree
- Adding insurance to an Account
- Account Visits and Transactions
- Insurance Refiles
- Demand print options for documents and patient reports

Practice Insight: (Presented on Tuesdays @ 3pm CST)

- How to view claim files
- How to wok invalid/rejected/denied claims
- How to search for claims
- How to manually download ERAS
- How to generate canned reports Ex: Timely filing, Appeal letter
- How to print claim list
- How to add/edit memos
- How to view an entire claim

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Document Manager (Administrative)

(Presented on Tuesdays @ 10am CST)

- Document Groups:
  - Explain the purpose of creating document groups
  - Show how to create a group
  - Show how to give rights to the group
- Document Importer
  - Show and explain how documents can be imported into MedEvolve
  - Show how you can assign the owner type, to a group, account or appointment.
  - Show rename feature
- Document Templates
  - Explain how documents should be saved in order for them to be seen when importing
  - Show the different Template Types
  - Show how to import
  - Show all RC options available to existing documents
  - Suggest best ways to make changes to a document that is already Imported into MedEvolve
- Document Tracker
  - Explain some of the ways document tracker is used
  - Explains how doctors signature can be tagged to
  - Show how documents can be moved from one account to another

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- Showed how documents can be emailed, faxed and deleted

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Wednesday

Scheduling: (Presented on Wednesdays @ 8am & 1pm CST)

- Accessing appointment scheduler
- Navigation through the scheduler
- Scheduler view options
- Scheduling an existing patient
- Scheduling a new patient
- Editing an appointment
- Copying an appointment
- Rescheduling and cancelling appointments
- Ad Hoc appointment scheduling
- Blocking an appointment slot
- Printing an appointment schedule
- Printing a Superbill

Reports (Administrative)

(Presented on Wednesdays @ 3pm CST)

- Aged Receivables
- Practice Financial Analysis
- Revenue & Service Analysis
- Show a couple examples of reports that can be created using Account Analysis

Appointment Templates: (Presented on Wednesdays @ 10am CST)

- Creating appointment templates
- Creating template series
- Editing appointment series

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<u>Thursday</u>

Charge Posting: (Presented on Thursdays @ 8am & 1pm)

- Creating a new control
- View old controls
- Posting Charges and over the counter payments in Bulk Posting
- Posting Charges and over the counter payments in Visits /Transactions
- Balancing the control
- Printing the control
- Editing the control
- Closing the control

Patient Collections: (Set-up) (Presented on Thursdays @ 10am CST)

- Set-up 1 letter series and level
- Set-up 1 payment plan series and level
- Set-up a Collector
- Set-up a Group and Assignment
- Run Collections Process
- Show Collection Reports from process

Patient Collections: (Worksheet) (Presented on Thursdays @ 3pm)

- Discuss Worksheet Icons
- Discuss Account number Color- codes
- Open Incident
- Open Promise
- Open Account Information
- Add Memo
- Send Documents
- Reassign Collector

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Friday

Insurance Follow up: (Presented on Fridays @ 8am & 1pm CST)

- Review Daily Process and Archive
- Unprocessable claims report
- Insurance filing report
- Confirmations
- Delinquent Transaction report
- Insurance Collections

Data Mining: (Presented on Fridays @ 10am CST)

- Accessing and navigating Data Mining Module
- Creating Data mining views
- Saving Views
- Printing and exporting views

Insurance Payment Posting: (Presented on Friday @ 3pm CST)

- Creating a new control
- View old controls
- Posting Insurance payments
- Posting Insurance Adjustments
- Posting COB information (Secondary's)
- Balancing the control
- Printing the control
- Editing the control
- Closing the control
- How to auto post ERAs

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