

# **WEBEX CLASSES**

## **LISTED IN SUGGESTED ORDER FOR NEW CLIENTS**

### **OPHTHALMOLOGY/OPTOMETRY**

**Note: Classes are available in V8.1 & V9.0**

**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. 1.5**

- 1. PREPARING FOR IMPLEMENTATION (Onsite & Webex) – The Administrator and all staff who will be meeting with the trainer during implementation**
- 2. COMPULINK 101 – All staff**
- 3. V8.1 OV (For those upgrading to V8.1) – All Staff**
- 4. V9.0 OV (For those upgrading or new to V9.0) – All staff**

### **APPOINTMENTS**

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

### **TABLES**

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

### **LEDGERS**

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

### **SPECTACLE RX**

- 13. CUSTOMIZATION AND UTILIZATION OF SPECTACLE RX SCREEN - Optical**
- 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 – Staff person(s) responsible for maintaining inventory**

**17. DME JOB COSTING SETUP** – Optical Manager & the staff member(s) responsible for maintaining tables

### **CL RX**

**18. MANAGING YOUR CL INVENTORY/CL RX FORM** – CL Staff /Techs

**19. NON-INVENTORY CL SETUP/CL RX FORM** – CL Staff/Techs

### **INSURANCE**

**20. COMPULINK 101 INSURANCE BILLING** – Billing Manager – Billing Staff

**21. NPI OV (V8.1 ONLY)** – Billing Manager – Billing Staff

**22. NPI OV (V9.0 ONLY)** – Billing Manager – Billing Staff

**23. ELECTRONIC BILLING (NEIC)** – Billing Manager – Billing Staff

**24. ELECTRONIC BILLING (DIRECT) & AUTO REMITTANCE** – Billing Manager – Billing Staff

**25. CLAIM VALIDATION SETUP** – Billing Manager – Billing staff

**26. PQRI**—Billing Manager – Billing Staff

### **VSP**

**27. GETTING ALONG WITH MR. VSP** (For those **NOT** using Eyefinity Interface) – Optical Manager – Optical Staff – Staff member(s) responsible for setting up and maintaining VSP tables

**28. RECONCILING VSP EOB** – Staff member(s) responsible for reconciling VSP EOB

**29. EYEFINITY (VSP) INTERFACE** – Staff member responsible for setting up the interface – Optical Staff

### **REPORTS**

**30. CRYSTAL FINANCIAL REPORTS** - Staff member(s) responsible for running reports in their own individual areas

**31. CRYSTAL GENERAL/ADMIN/ANALYSIS REPORTS** - Staff member(s) responsible for running reports in their own individual areas

**32. CRYSTAL RX REPORTS** - - Staff member(s) responsible for running reports in their own individual areas

### **ELECTRONIC HEALTH RECORDS –**

**33. IMPLEMENTING ELECTRONIC HEALTH RECORDS (V9.0)** Doctors/Techs

**34. ELECTRONIC HEALTH RECORDS OVERVIEW (V8.1)** Doctors/Techs

**35. ELECTRONIC HEALTH RECORDS SCREENS (V8.1)** Doctors/ Techs

**36. ELECTRONIC HEALTH RECORDS TABLES (V9.0)** Doctors/Techs (if responsible for tables)

**37. ELECTRONIC HEALTH RECORDS OV I (V9.0)** Doctors/Techs

**38. ELECTRONIC HEALTH RECORDS OV II (V9.0)** (Prerequisite: ELECTRONIC HEALTH RECORDS OV I) Doctors/Techs

**39. V8.1 TO V9.0 EHR BRIDGE Doctors/Techs**

**OTHER**

- 40. FUNCTIONS (RECALL/TODO/REFERRAL THANK YOU LETTER) –**  
Administrator & Staff Member(s) responsible for these functions
- 41. GL/AP WITH QUICKBOOKS INTERFACE –** Accountant, Administrator
- 42. INTEGRATING MICROSOFT WORD WITH YOUR**  
COMPULINK ADVANTAGE SOFTWARE – Staff member(s) responsible for  
creating letters or any other word processing documents
- 43. QUERY –** Administrator
- 44. V9.0 SCREEN BUILDER I –** Staff member(s) responsible for creating and  
maintaining screens
- 45. V9.0 SCREEN BUILDER II(Prerequisite: SCREEN BUILDER I)-** Staff  
member(s) responsible for creating and maintaining screens
- 46. SCREEN BUILDER III (Prerequisite: SCREEN BUILDER I & II)** Staff  
member(s) responsible for creating and maintaining screens
- 47. CUSTOMIZING SCREENS (DEMOGRAPHIC) (Prerequisite Screen Builder I) –**  
Administrator & any other staff member(s) responsible for maintaining screens
- 48. INTRODUCTION TO PRINT DESIGNER (Prerequisite:SCREEN BUILDER I/II &  
III)** Staff member(s) responsible for creating and maintaining screens
- 49. SMART FIELDS I-Doctors/Administrators and others** responsible for areas  
where Smart Fields can be used such as EHR,Spec RX, CL RX and Patient Demo  
screens
- 50. MANAGING YOUR ACCOUNTS RECEIVABLE I –** Billing Managers and  
Administrators
- 51. MANANGING YOUR ACCOUNTS RECEIVABLE II –** Billing Managers and  
Administrators
- 52. TABLE MAINTENANCE POST TRAINING –** Staff member(s) responsible for  
maintaining tables