



**General Information**

Practice Name: \_\_\_\_\_ Customer Code: \_\_\_\_\_

Training Location(s): \_\_\_\_\_  
\_\_\_\_\_

**Training Sessions Log**

Training Date: \_\_\_\_\_

Training Topic(s): \_\_\_\_\_

Trainer: \_\_\_\_\_ Training Time: \_\_\_\_\_

Training Attendees:

Office Manager: \_\_\_\_\_

Name/Title: \_\_\_\_\_

Name/Title: \_\_\_\_\_

Name/Title: \_\_\_\_\_

Name/Title: \_\_\_\_\_

Name/Title: \_\_\_\_\_

Additional Comments:

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Practice Signature: \_\_\_\_\_



Practice name: \_\_\_\_\_

Function	Date	MEDfx 3.0 User Guide Reference	Function	Date	MEDfx 3.0 User Guide Reference
<b>System Introduction</b>			<b>Administration</b>		
Login/Logoff MEDfx		1-3	<b>General functions</b>		
Navigation Pane		1-6	Codes – no punctuation		2-3
MEDfx Version		1-5	F2 – Display all codes		2-3; 2-4
Moving around		1-9	Advanced search features		2-3
Scroll bar		Intro	Selected data window		2-4
			Expiring codes		2-3
			<b>Table management</b>		
			Billing office		2-6
<b>Basic Functions</b>			Diagnosis table		2-8
F1 Online Help		Intro	Modifier table		2-9
F2 Save or Enter thru		1-9	Plan table		2-10
F3 Add		1-9	Practice table		2-12
F8 Delete		1-10	Procedure table		2-14
Auto Complete		1-12	Provider table		2-15
Auto Capitalize		1-12	Referral source table		2-18
Mandatory Pink fields		1-12	Service location table		2-19
Incomplete Yellow fields		1-12	Zip code table		2-20
Effective dates - Utilization		1-15			
Underlined links		Intro			
Search criteria – wild cards		2-3; 3-26	<b>Billing administration</b>		
Column – sorting/moving		1-15	Usual charge schedule		2-22
Auto formats		1-13	Payer fee schedule		2-23
Phone numbers		1-13	Statement strategy mgmt		2-24
Dates of birth		1-13	Billing strategy mgmt		2-32
Social security numbers		1-13	Claim strategy mgmt		2-33
Multi-tasking		Intro	ID code mgmt		2-35
Color scheme		1-7			



Function	12/30/99	MEDfx 3.0 User Guide Reference	Function	Date	MEDfx 3.0 User Guide Reference
<b>Administration</b>			Visit template table		2-73
<b>Appointment Scheduling</b>			Letter template table		2-74
Resource table		2-43			
Reason table		2-44	<b>Front Desk</b>		
Schedule template		2-44	<b>Front desk activities</b>		
Resource schedules		2-46	Patient search		3-26
View template		2-47	Manage appointments		3-29
Appointment display scheme		2-48	Outstanding recall summary		3-30
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Usual duration schedule		2-51	<b>Managed Care</b>		
Recall reason table		2-51	Manage referrals		3-4
			Manage pre-authorizations		3-8
<b>Treatment plan protocol setup</b>					
Care event table mgmt		2-54	<b>Miscellaneous</b>		
Treatment plan protocol table mgmt		2-54	Chart labels		3-11
Protocol Requirement Table Mgmt		2-56	Daily appointment list		3-12
			Manage recalls		3-15
<b>Security and Authorization</b>			Open new practice window		3-19
User account table mgmt		2-59	Patient appointment list		3-20
Role editor		2-60	Patient info sheet		3-21
			Patient ledger		3-23
<b>Advanced setup</b>			Select encounter forms		3-25
Account type table		2-62			
Billing agent table		2-63	<b>Patient chart</b>		
Carrier category table		2-64	Open/collapse panes		1-10
Case type table		2-64	Drop down arrows in panes		Intro
Customization table		2-66	Patient demographics		4-3
Encounter form setup table		2-66	Financial accounts - Add/Edit		4-10
Journal reason type		2-67	Upcoming appointments		
Note type table		2-69	Patient alerts		
Payment type table		2-72	View history		6-10
Specialty table		2-73	Claim history		
Style sheet table		2-73	Open referrals/authorizations		3-4



Front Desk		Bookkeeping	
Statement history		<b>Charge entry</b>	
Active recalls	3-15	Case summary	6-4
Treatment plan		Case type fields	6-4
Ledger	3-23	Visit	6-5
Notes		Chief complaint	6-6
		Co-payment amount	
<b>Manage insurances</b>		Co-payment at charge entry F9	6-10
Expire insurances			
Shift F5, F6 changes ins order		<b>Payment entry</b>	
No hyphens, spaces, symbols		Payment application	7-6
Cross-over coverage – never on primary insurance	4-13; 4-15	Unapplied money	7-7
		Bookkeeping defaults	5-5
<b>Enter new patient</b>		End of day – daily closing	5-3
Patient registration	4-1	Manage payments	5-9; 7-10
F2 or enter through tertiary ins to save		Manage closing	5-14
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Add insurance(s)	4-9	<b>Billing</b>	
		Select claims	8-3
<b>Appointment scheduling</b>		Select statements	8-17
Collapse search	9-2	Select encounter forms	8-21
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Patient list by insurance plan		10-62	<b>Appointment reports</b>	
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Patient immunization form		10-69	Select encounter forms	10-134
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