## Introduction

PrimaryData is committed to providing top quality training for your practice. Allowing the proper amount of time for training insures that you get the most out of MEDfx for years to come.

In order to determine the best training schedule for your staff, please review the training session descriptions below. Some of the sessions are required to successfully teach your staff how to skillfully navigate and perform their duties within the system. We will conduct a MEDfx Pre-Implementation Meeting with the practice manager. One of the meeting objectives is to further assist you in determining the best training schedule to achieve a successful MEDfx implementation for your practice.

***Note:*** *The following assumptions are required to maximize your MEDfx training.*

1. Experience using a PC with a mouse for all employees.
2. Dedicated learning time for employees to train MEDfx skills.
3. Time for employees to practice new MEDfx skills.

## Training Session Descriptions

The following pages describe the various types of MEDfx training sessions and meetings and their usual durations.

### Basic Administration (Table) Training

Basic Administration (Table) training normally takes 1 to 2 sessions to complete.

Objectives

1. Introduction to MEDfx for key individuals involved with the implementation.
2. Begin building data tables that are necessary for patient information, charge entry, and claim processing.
3. Assist practice manager and/or physicians in set up to identify issues in the old practice management system that MEDfx may address more effectively.
4. Assessment of end user(s), learning styles, and comfort levels with change from old practice management system to MEDfx.

This training covers most of the data tables in MEDfx allowing your practice to have a better understanding of MEDfx design principals.

## Front Desk Training

Front Desk training normally takes 2 sessions to complete.

Objectives

1. Provide an opportunity for the office staff to see how data entered and set up in Administration functions with MEDfx and introduce MEDfx to the remaining staff members in the practice.
2. Teach practice staff whose responsibility is to perform Front Desk functions. This includes: Patient registration, Appointment scheduling, Patient account management, Charge entry, Bookkeeping, and Basic reporting.
3. Provide task-oriented training, if applicable, to practice staff such as Patient chart look-up, Schedule review, and Printing.
4. Discuss final strategies for Go-Live Training Days.

Front Desk Training is usually separated into two sessions:

1. The first session is comprised of:
   - Patient registration;
   - Appointment scheduling;
   - Patient account management;
   - Basic reporting as it relates to scheduling and Patient registration.
2. The second session reviews Front desk and Bookkeeping functions more extensively. Charge entry overview may be conducted when there is a defined billing department/office.

The two session plan is useful when there is a dedicated group that only performs charge entry and billing or to create a strong comfort level with staff preparation.

Front Desk Training is typically scheduled about two weeks prior to the Go-Live date. Keeping the training close to the Go-Live date allows for a smoother transition. At the completion of the Front Desk Training, all staff are encouraged to spend time daily in the MEDfx system.

## Go-Live Training

Go-Live training normally takes 2 consecutive days to complete.

Objectives

1. Provide on-site support to staff with final transition to MEDfx during office/clinic hours.
2. Provide training to billing staff as it relates to live claim submissions and patient billing.
3. Teach billing staff about the management of claim reports from clearinghouse and payors.
4. Teach end-of-day reconciliation reports and the daily close process.

***Note:*** *Your trainer will offer suggestions/recommendations on how all appointments will be moved from the old practice managment system to MEDfx by the time of the Go-Live Training.*

The success of the Go-Live Training is dependent, but not limited to, the following factors:

- Appropriate Administration set up
- Staff commitment to learning a new system
- Staff practice time after each pre-Go-Live training session

A change in the practice management system can be a stressful time for the practice as the staff becomes proficient working with a new system while continuing to keep office tasks running efficiently. Correct Administration set-up results in a smoother transition with minimal or no financial impact to the practice.

### Follow up to Go-Live Training

The timeframe is determined by the trainer and the practice manager.

Objectives

1. Allow trainer to check on progress of the practice after Go-Live Training.
2. Allow practice staff to address issues/questions.

The follow up may be conducted onsite, via remote access, or by telephone.

### Payment Posting and Reporting Review

This training review usually is scheduled approximately 2 to 3 weeks after Go-Live.

Objectives

1. Conduct a more extensive payment posting session with actual payments and explanation of benefits.
2. Cover how to post insurance payments, take-backs, patient refunds, and insurance refunds.
3. Review posting returned checks, risk withheld payments, and bulk capitation payments.
4. Review functions of patient billing, claim submission, and review any outstanding rejections from clearinghouse or carriers.
5. Review MEDfx Reporting component and provide sample reports from the practice's system for review.
6. Review functions of MEDfx Online Help that provide detailed information regarding the reports within MEDfx.

Payment Posting and Report Review is not completed until the practice has reached Go-Live to allow time for good accumulation of insurance EOBs to cover during the training session. We recommend that checks received be deposited. EOBs should be set aside for posting during the training session. Statement billing is reviewed again and statements are generated for mailing or transmission during this session as well.

Reporting is reviewed in detail during this session. Each report is generated and reviewed to help determine what reports should be run on a daily, weekly, and monthly basis.

**Final Wrap-Up Meeting**

This meeting is usually scheduled 4 to 6 weeks after payment posting.

<u>Objectives</u>

- Discuss any outstanding MEDfx implementation issues.
- Obtain feedback from key staff.
- Determine if there are any remaining problem areas and to alert the PrimaryData Sales or Technical Support departments.

The Final Wrap-Up Meeting is normally scheduled for 4 to 6 weeks after the Payment Posting and Reporting Review session. This is an informal meeting in which the trainer is able to spend time with the key end users to determine any outstanding issues and obtain feedback regarding the completed implementation process.