

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 SpringCharts 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 SpringCharts 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 SpringCharts implementation for your practice.

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

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

SpringCharts EHR “Rapid” Training Plan

The following training plan is our “Rapid” SpringCharts EHR Training Plan, organized to get a small practice up and running in one day. In addition to this training we recommend a second day of SpringCharts EHR follow-up reinforcement training to maximize your practice's knowledge and productivity of SpringCharts.

We have additional training plans for larger practices that focus on key areas within the practice and getting each up to speed quickly.

SpringCharts Group Training (1 Day Schedule)

SpringCharts EHR Morning Class (9:00am – 12:30pm)

1. Introduction & User Preferences

- A. SpringCharts EHR Introduction
- B. User Preferences
- C. Password
- D. Data Setup
 - New Addresses
 - Editing Addresses
 - New Patient
 - Editing Patients
 - New Insurance
 - Editing Insurance

2. Practice View Screen

- A. Introduction
- B. Appointment Calendar
- C. Patient Tracker
 - Color Coding
 - Location & Status
 - Tracker Group
 - Patient Info
 - CheckOut
 - Tracker Archive
- D. ToDo's/Reminders
 - My ToDo List
- E. Internal Messages
 - Non-Patient Messages
 - Messages Concerning Patients
- F. Urgent Messages

G. Emails

3. Patient Chart Screen

A. Introduction

B. Face Sheet

- Allergies
- Other Sensitivities
- Social History
- Past Medical History
- Family Medical History
- Referring Physician
- Chart Note
- Routine Medications
- Problem List
- Chart Alert
- Primary Insurance
- Diagnosis, Prescription & Procedure History

C. Care Tree

D. File Menu

- Find Text
- Evaluate Chart
- Exclude Chart from Search
- Export Chart
- Household List
- Print Chart
- Print Face Sheet
- Close Chart
- Lock Chart
- Change View
- Continuity of Care Record

E. Edit Menu

- Set/Delete Default Pharmacy
- Add Patient’s Photo

F. Actions Menu

- Lab, Imaging & Medical Tests
- Lab Trends
- Diagnosis List & Procedure List

- Medication List
- Immunization
- Graph Vital Signs

G. New Menu

- New Office Visit
- New Note
- New Nurse Note
- New Prescription Refill
- Drug & Allergy Interactions
- New Telephone Call (TC) Note
- New Vitals Only
- New Letter to Patient
- New Letter About Patient
- New Test Report
- New Excuse/Note/Order
- Flow Sheets
- Import Items

H. Patient Chart screen Toolbar

SpringCharts EHR Afternoon Class (1:30pm – 5:00pm)

1. Office Visit Screen

- A. Introduction
- B. Building an Office Visit
- C. Routing Slip
- D. Activating New Diagnosis Codes & Drugs
- E. Discontinued Medications
- F. Editing PopUp Text
- G. Office Visit Reports
 - Report to Patient
 - Office Visit Note
 - History & Physical Report

H. Edit Menu
• Face Sheet modification

I. Actions Menu
Medical History Lists

J. Tools Menu
• Calculators
• Draw Program
• Excuse Notes
• Date of Service

K. Office Visit Addendum

2. Clinical Tools

A. Chart Evaluation

B. Evaluation & Management Coder

C. Superbill Form

D. Patient Instructions Management

E. Plan of Care Management

3. Customizing Templates & PopUp Text

A. Introduction

B. Office Visit Templates

C. Orders Templates

D. Letters Templates

E. Managing Templates

F. Customizing PopUp Text

4. Tests, Procedure & Diagnosis Codes

A. Ordering a Test

- B. SpringLabs & Reference Lab Results
 - Processing the Test Result
- C. Managing & Charting Test
 - Automated Test Status Alerts
- D. Creating a New Test
 - Lab Tests
 - Imaging Study or Medical Test
- E. Ordering and Activating Procedure & Diagnoses Codes
 - Ordering a Procedure
 - Creating a New Procedure
 - Creating a New Diagnosis
 - Editing Procedures & Diagnoses

5. Utilities

- A. My Websites
- B. Time Clock
- C. Search Database, Form Letters & Reports
- D. Calculators
- E. Bulletin Board
- F. Integrated Faxing
 - Outbound Fax History
 - Inbound Fax List
- G. Patient Archive
- H. Practice View screen Toolbar