

simplifyMD's Simple Exercises for the New User

Exercise Preparation:

1. Create a Test Chart for each user (example Betty Test, Jim Test) (use "Add Patient" tab)
2. Have a few "test documents" scanned into the Filing Center
3. Have a few of your Templates saved as PDFs in the Test Patient Chart
4. Most of these exercises can be done after Admin Set Up, some of them require Faxing and Scanning to be integrated with the Application

FRONT OFFICE / Admin – EXERCISES (please use your own Test Chart you created)

1. Add/create a **new patient** using "Add Patient" tab (pg. 53 Basic User Guide)
 - a. Two potential variations (if Practice Management System is / or is not Interfaced)
2. Create a patient **appointment** (pg. 12 Basic User Guide)
 - a. Two potential variations (if Practice Management System is / or is not Interfaced)
3. **Check In** – that patient appointment you just made (pg. 15 Basic User Guide)
4. **Print** a Template/Form related to the "Check In" process (example a "Check In / Registration Packet" for a new patient) (pg. 22 Basic User Guide)
5. Practice **scanning** in a Photo ID and Insurance card (Custom/color) – directly to the Patients "Registration" Tab in their chart (pg. 4 Scanning Remote)
6. Practice taking a **picture** (have a co-worker take your picture) so it can be added to the Profile area of YOUR Test Chart Face Sheet. (pg. 55 & 56 Basic User Guide)
7. Complete the entire **Profile** area of your Test Charts Face Sheet(pg. 55 Basic User Guide)
8. IF INTEGRATED with our E-Prescribing Partner's application – **add a Pharmacy location** for your Test Chart (pg. 6 eRx Guide)
9. Set the "**Primary**" Contact Method preference in your Test Chart, on the "**Contacts Method**" widget, on Face Sheet (pg. 57 Basic User Guide)

10. **Simple Print** a benefits page from one of your Insurance Companies websites – directly into the Filing Center (paperless) (pg. 41 Basic User Guide)
11. **Print** using the **Adobe tool bar** – a page in one of the Tabs your Test Chart (pg. 65 & 66 Basic User Guide)
12. **Print and Fax** two sets of scans/documents from the **“Assembly” Tab** , WITH the Providers electronic signature included (pg. 66 Basic User Guide)
13. **Fax** a document from the Test **Patient’s Tab** (pg. 72 & 73 Basic User Guide)
14. **State your process of monitoring and routing incoming Faxes** (both - patient related & business related; for non-patient related faxes could ADD “email” function to the Adobe Tool Bar and email the fax from Filing Center, to action person/staff member and then “Recycle” the fax)
15. Change the Waiting **Room status** – to an Exam Room (pg. 16 Basic User Guide)
16. **Check Out** the Test Patient and **Print** any related **“Check Out Forms”** (example: return to work template) (pg. 22 Basic User Guide)
17. **Messaging**
 - a. Send a **“P”** (**personal**) Message (from the Home Screen) to a co-worker (pg. 14 Basic User Guide)
 - b. Document a “Note to Chart” in your Test Chart (example: you feel better after 3 days on antibiotic) (pg. 60 & 61 Basic User Guide)
 - c. Send a **“M”** (**medium priority**) Message (from your Test Chart) without an attached document – to a co-worker (pg. 12 Basic User Guide) (pg. 59 & 60 Basic User Guide)
 - d. Send a **“H”** (**high priority**) Message (from your Test Chart) with an attached document – to a co-worker (pg. 59 & 60 Basic User Guide)
 - e. Send a **S** (**signature request**) to one of your Providers, from the Filing Center – as you File the Document to the patients chart (pg. 36 Basic User Guide)
 - f. **Reply** to a message (pg. 28 Basic User Guide)

BACK OFFICE / Clinical - EXERCISES (please use your own Test Chart you created)

1. Encourage Clinical Staff to also do **all of Admin Staff's PRACTICE** above
2. On a Checked In patient (patient is in the Waiting Room) update/change **Room Status** to Exam Room (pg. 16 Basic User Guide)
3. Enter a full set of **vital signs** into your Test Patient Chart (Face Sheet's "Patient Vital Statistics" Widget (pg. 57 Basic User Guide)
4. Enter an **Allergy** into Test Patients Face Sheet (pg. 57 Basic User Guide)
 - a. use "Medication Allergies" Widget – IF **integrated** with E-Prescribing partner's application = use Dr First's Rcopia to enter the allergy and have it sync/transfer into simplifyMD's widget
 - b. use "Allergies" Widget if **not integrated** with E-Prescribing application
5. Enter a new **Medicine** and a series of medications form patients medication history (pg. 57 Basic User Guide)
 - a. use "Enhanced Medications" Widget – IF **integrated** with E-Prescribing partner's application = use Dr First's Rcopia to enter the medication and have it sync/transfer into simplifyMD's widget
 - b. use "Medications" Widget if **not integrated** with E-Prescribing application
6. IF you document a on a "portion" of Providers outpatient Progress Note/Encounter Form/Visit Form (example – vitals and chief complaint ; open that Template in your Test Chart &
 - a. See the vital signs you entered on the Face Sheet (and anything else we **Merge Tagged** over) – automatically pull over onto the Template
 - b. Enter "Chief Complaint" and **save the Template** (keeping it in **MS Word file format = editable**) (there may be a couple variations here... based upon your Operating System and version of MS Word)
 - c. Practice with another template – **saving the Template back to patients chart as a PDF** (sealed/not editable and now faxable)
 - d. Fax PDF Progress Note (to simplifyMD 678 578 6177)
7. Print out Educational Materials
8. Print out a "Print Friendly Face Sheet"

Providers – EXERCISES (please use your own Test Chart you created)

1. We encourage Providers to become familiar with Admin and Clinical Staff's PRACTICE above
2. Practice using the “**simple chart**” function (pg. 57 of Admin Set Up Guide shows how it is tailored to each Providers preference)
3. Practice **electronically signing – signature requests** sent to you from staff (documents faxed or scanned into Filing Center that were also sent to you for review and signature) (pg. 47 Basic User Guide shows how to track all your still “open”/outstanding messages)
4. Practice **electronically signing – documents within a Patients Chart Tab** (independent of a signature request) (pg. 27 Basic User Guide)
5. Practice using the “Dic” for **chart Dictated** check box on the Schedule page (pg. 13 Basic User Guide)
6. Practice using the “**Review This Document**” button, within the Test Patient's Chart Tabs (simulating reviewing a Mid-Level Providers progress note)
7. Practice the (4 of the 5 types of **Messaging**) (you won't be sending, but rather receiving Signature Requests)
 - a. Send a “**P**” (**personal**) Message (from the Home Screen) to a co-worker (pg. 14 Basic User Guide)
 - b. Document a “Note to Chart” in your Test Chart (example: you feel better after 3 days on antibiotic) (pg. 60 & 61 Basic User Guide)
 - c. Send a “**M**” (**medium priority**) Message (from your Test Chart) without an attached document – to staff member (pg. 59 & 60 Basic User Guide)
 - d. Send a “**H**” (**high priority**) Message (from your Test Chart) with an attached document – to a staff member (pg. 36 Basic User Guide)
 - e. **Reply** to a message (pg. 28 Basic User Guide)