

## CPS Practice Management

### PM Front Office

#### **Session 1 - Scheduling & Registration - Level 1 – 8am-5pm**

Schedule Overview	Appointment Chain
New Patient - Schedule	Check In/Out
Established Patient - Schedule	Views
Reschedule	Registration Overview
Modify/Cancel	New Patient - Register
Appointment Activity	Appointment Tab
Superbills	Historical Tab
Patient Profiles	Financial Tab
Confirming Appointments	Scanning
Next Available Appointments	
Recalls	
Appointment Set	

#### **Session 2 - Scheduling & Registration - Level 2 – 8am-5pm**

Schedule Overview	Finding Checks
Waiting List	Statements - Demand
Eligibility – Individual	Billing Criteria
Eligibility – Batch	Batches
Work Comp	Transaction Tab - Copays
Referrals	Receipts
Accident	Daily Balance/End of Day
Authorization	Closing Batches
Attach Cases	Payment Plan Review
Account Summary	
Transaction Management Overview	

#### **Session 3 - Scheduling & Registration - Level 3 – 8am-5pm**

Administration Overview
New Schedule Template
Modify Schedule Template
New Insurance Carrier
New Allocation Set
Task Management
Reports

## CPS Practice Management

### PM Billing

#### Session 1 - Billing - Level 1 – 8am-5pm

Schedule Overview	Post Charges
Registration Overview	Diagnosis Search
Eligibility	Charge Sets
Cases	White Doctor Bag
Account Summary	No Filing Visits
Billing Criteria	Retrieve Charges
Batches	Approve Visits
Visit Info Tab	Receipts
Visit Notes Tab	Statements - Demand
Transaction Tab - Copays	Charge Management
Visit Correspondence Tab	Daily Balance/End of Day
Visit Claims Tab	

#### Session 2 - Billing - Level 2 – 8am-5pm

Create Payment Plans	Conveyance
Approve Visits	Coordination of Benefits
Batch Visits	Transaction Management
Void/Clone	Unapplied Funds
Payment Entry Intro	Balance Forward
Patient Payment	
Single Insurance Payment	
Bulk Insurance Payment	
Insurance Refund	
Patient Refund	
Remittance Processing	

#### Session 3 - Billing - Level 3 – 8am-5pm

EDI Submission	Correspondence Notes
EDI Response	Custom Letters
AR/Collections	Reports
Insurance Carrier EDI	End of Month
New Allocation Set	
Task Management	

**CPS Practice Management  
PM Administration  
Session 1 – Administration – 8am-5pm**

CPS PM Overview  
Administration Overview  
List Editor - Allocation Type  
List Editor - Application  
List Editor - Security  
Ribbon - Allocation Sets  
Ribbon - Companies  
Ribbon - Fee Schedules

**Session 2 – Administration – 8am-5pm**

Ribbon - Insurance Carriers  
Ribbon - Procedures  
Ribbon - Referring Providers  
Ribbon - Responsible Providers  
Schedule Templates  
Batch Closing  
Closing Date  
Reports

## CPS Electronic Medical Records

### EMR Charts

#### Session 1 - Clinical Staff – 8am-5pm

Logging In/Out	Medications
Chart Navigation	Medication Administration
Desktop Intro	Immunization Management
Desktop Schedule	Handouts
Desktop Documents	Patient Specific Education
Out of Office	Letters
Preferences	Reminders
Documents	Graphs
Transition of Care	Protocols
Chart Documentation Update	Clinical Visit Summary
Ending Updates	Care Plans
Problem Search	Queries

#### Session 2 – Administration – 8am-5pm

Chart Overview	List Editor - History View
Logging In/Out	List Editor - Protocols
Desktop Intro	List Editor - Form Components
Desktop Schedule	List Editor - Text Components
Desktop Documents	List Editor - Encounter Types
Out of Office	List Editor - Document Templates
Preferences	List Editor - Document Types/Views
Chart Navigation	List Editor - Clinical Documents
Documents	List Editor – Handouts/Letters
Updating Chart	List Editor - Clinical Reports
Ending Updates	Queries
List Editor - Custom Lists	
List Editor - Flowsheet View	

#### Session 3 – Administration – 8am-5pm

List Editor - Orders	Recurring Orders
List Editor- Service Provider	Workflow Evaluation
List Editor - Order Defaults	GE Portal Site
List Editor - Codes/Categories	
Ribbon - Appointment Types	
Ribbon - Pharmacies	
Appending Documents	
Order Completion	