OrthoTrac Software

Training for OrthoTrac software is designed for all team members and provides instructions for using the software. This agenda includes a list of topics to be covered during the training.

To achieve the maximum benefit from training, team members should reserve dedicated time to participate. Interruptions should be minimal in order to guarantee that all material can be reviewed. The practice is responsible for training team members who do not participate in the training. Online videos and recorded sessions will supplement the training and can be accessed at any time by all team members.

Session 1: Overview, Adding Patients, and Scheduling Patient Appointments

Attendees: Entire Office; All Staff Members

- Overview/Navigation of Carestream Dental Institute—Online Help Topics
  - My Assignments, My Live Classes, My Learning History
  - Catalog—Searching the Catalog for Single Help Topics
  - Webinars
- Electronic Workbook
  - Access
  - How to Print/Print Single Pages
- Log into OT
- Navigate OT
  - Main Menu Overview
  - OT Help Menu
    - Help Files
      - Contents, Search, Favorites, Printing
- Create To Do List
- Use the Timecard
- Use the Roladdress
- Work with Patient Charts
  - Add Patient Charts
  - Link Family Members
  - Edit Patient Charts
  - View Schedule Information
- Work with Scheduler
  - Schedule a Patient Appointment
  - Change and Cancel Appointments
  - Confirm Appointments

- Create Scheduler Messages
- View Scheduler Statistics
- Generate Schedule Reports
- Work with Recalls
  - By Date
  - Alpha

Session 2: Setting Up/Managing Insurance and Financials

Attendees: Office Manager; Administrative Staff

- Insurance Plans
  - Add and Modify Insurance Carriers
    - Required Fields: Name, Address, Employer, Group Number, Payer ID, Claim Office
  - Link Insurance Carrier to a Patient
    - Add Subscriber ID
    - Rank Insurance
- Post Charges and Payments
- Work with Contracts and Payments Plans
- Set Up Auto Payments
- View Patient Ledger
- Create and Edit Insurance Claims
- Post Adjustments
  - Transfer Balances Between Patient and Insurance Accounts
  - Daily Reports/Processes
  - Run AutoPayments, if applicable
  - Daysheet
  - No Show Report

Note: Manual conversion offices will schedule a session 2B. This is an hour session and will teach the team how to enter starting balances. All balances must be entered and AR verified before Session 3 can take place.

Session 3: Charting/Clinical

Attendees: Doctor; Clinical and Administrative Staff Members

- Basic OrthoTrac Navigation, if applicable
- Patient Flow
  - Check-in a Patient/Change a Patient's Location
- Use the Light Bar to Access a Patient's Treatment Card

- Show Charting Layout
  - Links to Patient Info, Financials, Doctor Information
  - Treatment Status Bar, Tx Phases, and Compliance History
  - Documents
- Treatment Entry: Add Mechanics, Aligners, Today's Notes, Next Appt, and Futures
- Work with a Tooth Chart
- Notes Tab
- Execute Questionnaires
- Treatment Plan Overview
- Checkout a Patient
  - Schedule Appointments Requested from the Chart

Session 4: Go Live

Note: This session is not required for a non-conversion office.

Attendees: Entire Office; All Staff Members

Working live with converted data

- Verify Accounts Receivables
  - Print
  - Age All Accounts
- Roll Accounts
- Configure Maintenance/Customize System Settings
  - Staff Maintenance
  - System Maintenance
    - Define Patient Add Options
  - Outside Doctor Information
  - Other Referrals
  - Time Clock, Carriers, Ticket Messages, etc., as needed
  - Procedure Code Maintenance
    - Setup Insurance Procedure Codes
  - Scheduler Maintenance
    - Define Appointment Types
    - Create Scheduler Standards
    - Add and Remove Calendar Days
  - Setup Insurance Claim Options
  - Define Charting Maintenance/Configure Patient Flow Options

- Review Entering Back Data
  - Patients and Insurance Account Information
  - Update Schedule Information
  - Contracts, Charges, Payments
- Daily Reports/Processes
  - Run AutoPayments, if applicable
  - Daysheet
  - No Show Report

Session 5: Letters and Questionnaires

Note: Schedule this session as close to Session 4 as possible to ensure a smooth transition.

Attendees: Entire Office; All Staff Members

- Send eClaims, if applicable
- Post and Print Letters
- Create and Edit Letters
- Modify Existing Questionnaires and Setup New Questionnaires
- Use Document Storage
- Configure System Security—with Doctor/Office Manager, if applicable

Session 6: Periodic Processes

Note: Schedule this session approximately two weeks after the Go Live session. During these two weeks, the office should keep a list of outstanding questions or contact Support for items that need immediate assistance.

Attendees: Office Manager; Administrative Staff

- Office Questions
- Generate Statements
- Reports
  - Ledger Scan (Contracts)
  - Patient Tracking Report
  - Other Pre-Defined Reports
  - Contact Expert
- Confirm and Generate COT Claims
- Post Bulk Insurance Payments
- Work with Promises
- Use Office Experts