WinOMS Software: Administrative Team

Training for the WinOMS software is designed for all administrative 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.

Note: If an office is not doing an electronic conversion, a two-hour Configuration session will be scheduled. During this session, your team will be shown how to set up practice information, providers, referring doctors, medical conditions, and so on. Depending on the number of records to be added, homework will be assigned so that all files will be complete and ready for training. During the Configuration session, your trainer will discuss a go live checklist with you.

Session 1 (3 hours)

Attendees: Office manager, billing/insurance coordinator, front/discharge staff.

Initial Training Workbook

- Electronic Workbook
- Use Workbook to Take Notes/How to Print Workbook or Single Pages

Overview/Navigation of Carestream Dental Institute

- Online Help Topics
- My Assignments, My Live Classes, My Learning History, Catalog—Search the Catalog for Single Help Topics

Navigating

- Log In—Computer vs. Software
- Time Clock
- Select Office Location, if applicable
- Change Password
- Practice Central/Preferences
- Carestream Dental Institute (CDI)
- Online Help/Training Workbook
- Accessing Client ID and License Details
- Vendor List/Support Numbers

Referrals

- Referral Search Features
- Referral Category
- Demographics
- Interests
- Public Relations
- Referred Out

Scheduler

- Lockouts
- Appointment Categories and Appointment Types
- Basic Introduction to the Scheduler
- Create an Appointment
- Create a Walk-In Patient
- Convert a Walk-In Patient
- Right-Click Features/Cut and Paste
- Confirm an Appointment
- Find Next Available Feature
- Patient Appointment History
- Edit an Appointment
- Work with Cancellations/No Shows
- Check In a Patient
- Follow Up Appointment
- Scheduler Reports

Finalize Go Live Checklist

Session 2 (3 hours)

Attendees: Office manager, billing/insurance coordinator, front/discharge staff.

Review Workbook

Review Carestream Dental Institute

- My Live Classes, My Learning History, Catalog—Search the Catalog for Single Help Topics

Patient Record/Patient Workspace Tab

- Create/Edit Billing Categories
- Create a New Patient
- Guarantor Vs. Insured Party
- Enter Demographics
- Add a Referral—Primary Referral
- Extended Tab—School, Employer, Emergency Contact, Email, HIPAA Preferences
- Billing Tab—Add a Guarantor

- Use of Alternate Guarantor/Rotating
- Billing Information–Defaults
- Overview of the Patient Workspace
    - Global Toolbar
    - Scheduler Snapshot
    - HIPAA Preferences and Signed HIPAA Consent
    - Right-Click Features
    - Tabs and Additional Features
    - Edit Demographics
- Contact Notes—HIPAA Acknowledgement
- Recall—Adding, Types, Icons

Patient Record EMR Tab

- Right-Click Features
- Global Toolbar
- Schedule Snapshot
- HIPAA
- Alerts
- Chart Status
- Medical History Items
- Navigating to All Items—EMR Summary, Procedure Hx, Encounter Slip, Rx Follow-Ups, Implants, Consents, Anesthesia, Notes, Images, Attachments, Treatment Plans

Additional Topics

- Dock a Patient
- Miscellaneous Notes

Session 3 (3 hours)

Attendees: Office manager, billing/insurance coordinator, front/discharge staff.

Treatment Plans

- Treatment Plan Names
- Add a Treatment Plan
- Print—Summary/Proposal or Merge Letter
- Submit a Pre-Authorization

Charges and Payments

- Post a Charge
- Single and Batch Edits
- Post a Payment/Adjustment

Billing Categories

- Advantages
- Create and Edit

Insurance

- Carrier
- Plan Type—Medical/Dental
- General Tab
- Fees/Benefits Tab
- Forms/ID/Notes Tab—Electronic
- Add Insurance to a Patient Chart
- Create an Insured Party
- Create and Edit an Insurance Claim
- Insurance Tab—All Features
- Work with the Insurance Queue
- Print an Insurance Claim
- Walkout Statement vs. Statement

Procedure Codes and Fee Schedules

- Fee Schedule/Allowance Tables
- Procedure Codes/Add/Edit/Delete
- Cross Coding

Diagnosis Codes—ICD-10

- Create and Edit Diagnosis Codes
- Diagnosis Categories
- Activate New Codes
- Using My Favorites

Letters, Attachments, and Scans

- Mail Merge—Templates and Referral Letters
- Attachments
- Scanning
- Image Categories
- Set Preferences for Default View and Privacy
- Link Encounter Slips/Tickets to Appointment Types
- Set Up EMR Type and Chart Status Defaults
- Integration of Electronic Encounter Slips into the Workflow

Session 4—Go Live (3 hours)

Attendees: Doctor (for training on security), office manager, billing/insurance coordinator, front/discharge staff, lead clinical staff.

Note: This session is not required for new practices.

- **Manual Conversion**: You will need to set aside additional time so that your team can manually add data, such as patient demographics, starting debit balances, and appointments. Your trainer will help you create a timeline.
- **Electronic Conversion**: **Working in Live Data**
  - Back-post treatment and payments from date of final back-up.
  - Recreate Scheduler.

  Note: Your office will be shown examples of how to back-post treatment and post payments from the date of the final back-up. Your team is responsible for completing all remaining back-posting after training. The same is true for updating the WinOMS Scheduler.

  - Run reports with office manager, doctor, or owner.
  - Security with doctor or owner.

Session 5—Workflow (3 hours)

- Office will participate in several real office scenarios: Creating/rescheduling appointments, checking patients in/out, posting treatment, applying payments, creating treatment plans, submitting insurance, etc.

Q&A (1 hour)

- System Security with Doctor
- Q&A with Team

Additional topics could include:

- Reports
- Contact Experts
- Workspace Preferences
- Statements

Note: If you are interested in additional training, talk with your trainer.