

# Receptionist/Scheduler Education Journey



## **Receptionist/Scheduler Education Journey**

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# **Receptionist/Scheduler Education Journey**

## Introduction

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### A Note to the Receptionist/Scheduler...



This education journey is geared toward those with a receptionist or scheduler position in the clinic. The following steps presented, give those in these positions, a condensed version of what information regarding the use of SOAPware, is pertinent, based on these specific roles. SOAPware recommends going through each step, and viewing each lesson highlighted. It will also be helpful to take time to practice what each lesson teaches, through hands-on learning in SOAPware.

For easy navigation, Click on the link at the bottom of each lesson within this journey, to access the next lesson.

**Continue to Step 1**

[Next Lesson](#)

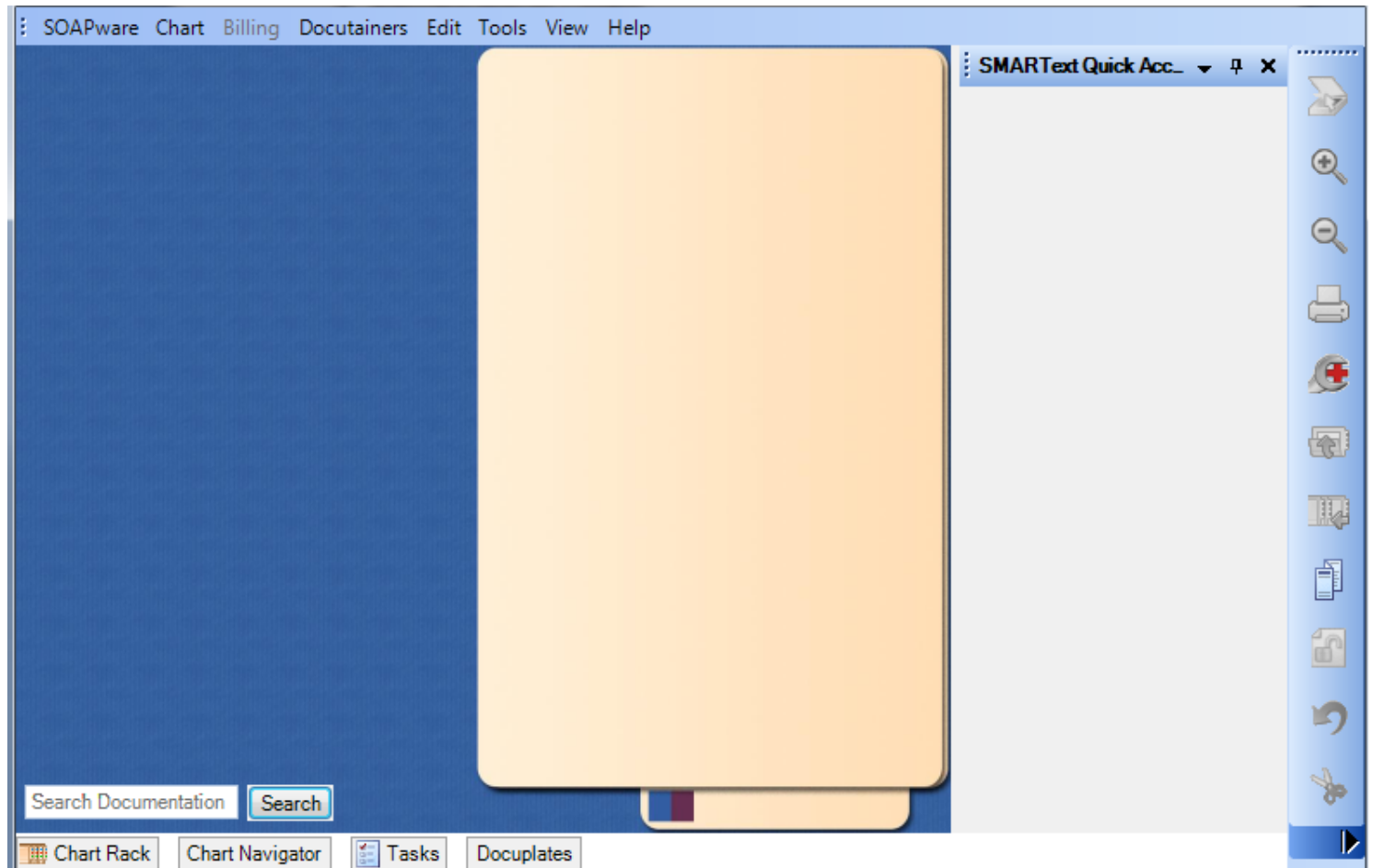
# Step 1

## Exploring SOAPware

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It's time to explore the SOAPware interface! Review the information listed in the link below to learn how to log into SOAPware, create docked tabs, key commands, and several other items within the SOAPware interface.

### Link



To view the Exploring SOAPware lessons please click here: [Exploring SOAPware](#).

### Continue to Step 2

### Next Lesson

# Step 2



## Schedule

Click on the link below to learn all about our Schedule workspace!

[Link](#)

The screenshot shows the SOAPware Scheduler interface for Seaside Clinic. The top menu bar includes SOAPware, Billing, Scheduler, Edit, Tools, View, and Help. The main window displays a calendar for November 2011, with the 9th highlighted. Below the calendar is a 'Today' button. On the left, there are tabs for 'Providers' and 'Resources'. Under 'Providers', four providers are listed with checkboxes: Kaye L. Yocham, Rena O'Dell, Rita Pense, and Shannon Shores. Below this is a 'Facility Legend' with three items: Open (yellow), Closed (orange), and Unique Closings (pink). The main area shows a grid for Wednesday, November 09, 2011, with columns for Shannon Shores, Rita Pense, Rena O'Dell, and Kaye L. Yocham. The grid is color-coded: green for Shannon Shores, orange for Rita Pense, pink for Rena O'Dell, and yellow for Kaye L. Yocham. The grid shows time slots from 10:15 am to 2:00 pm.

## Schedule

[Continue to Step 3](#)

## Next Lesson

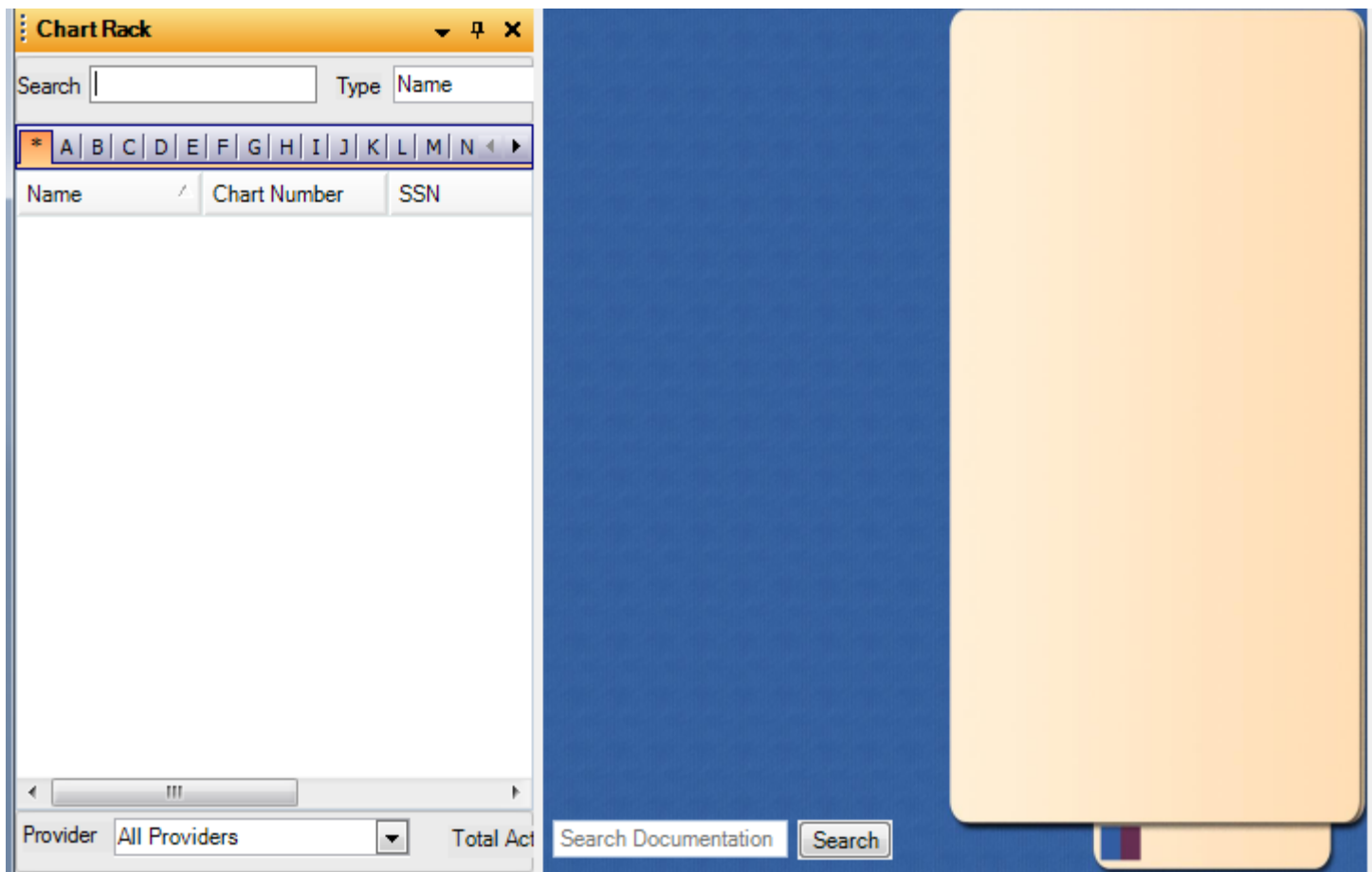
# Step 3

## Introduction to Charts

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The following 6 links will provide the user with an overview of the Chart workspace in SOAPware.

### 1. Understanding the Chart Workspace



### Understanding the Chart Workspace

### 2. Chart Rack

#### Chart Rack

### 3. Creating a New Chart

#### Creating a New Chart

### 4. Entering Demographics

#### Entering Demographics

## 5. Closing a Chart

### Closing a Chart

## 6. Accessing Patient Charts

### Accessing Patient Charts

## Continue to Step 4

### Next Lesson

# Step 4

# Contacts

SOAPware can maintain a list of frequently used contacts, along with basic demographic information for the contacts.

## Link

Contact Manager

Add New Contact

Name	Specialty	City	State	Phone	Fax
X Contact, Sample	Abdominal Radiol...	Fayetteville	AR		(555) 555-1212
X Shoe, Bill					
X Downland, Sam					
X Cherry, Reese					

To view more information on contacts, see: [Contacts](#).

## Continue to Step 5

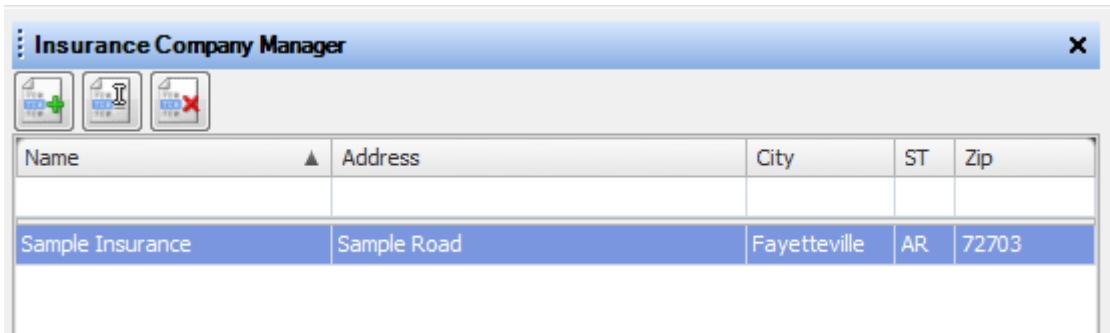
[Next Lesson](#)

# Step 5

# Insurance Company Manager

Insurance companies can be added into the Insurance Company Manager within SOAPware.

Link



For more information see: [Insurance Company Manager](#).

Continue to Step 6

[Next Lesson](#)



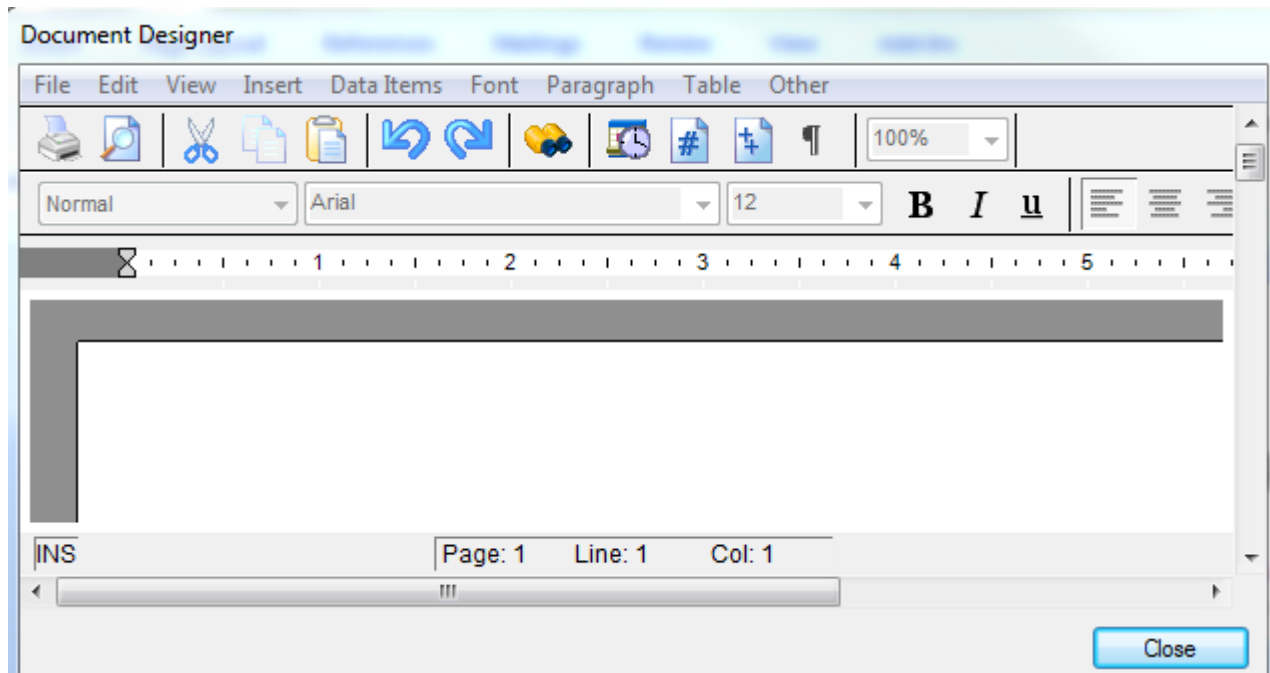
# Step 6

## Printing Document Designs

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This step will help the user to learn how to save and print a document design in SOAPware.

Link



### Saving and Printing a Document Design

Continue to Step 7

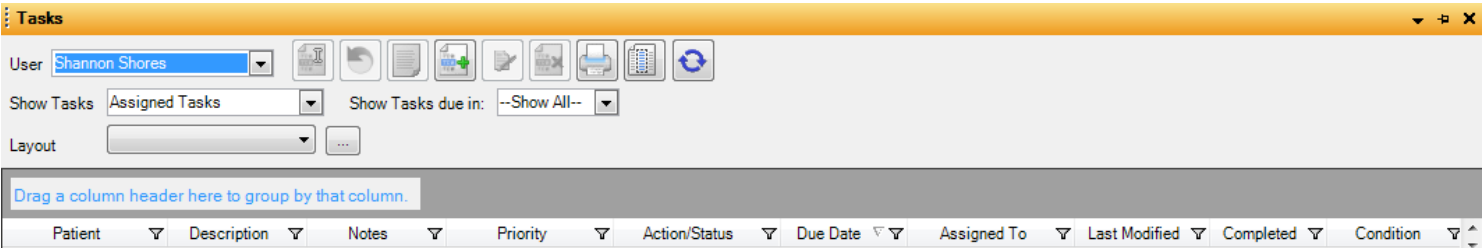
Next Lesson

# Step 7

# Task Manager

Task Manager allows a user to track the status of all tasks, as well as send messages or reminders to other users.

## Link



For more information see: [Task Manager](#).

## Continue to Step 8

### Next Lesson

# Step 8

## Document and Chart Management

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To learn about the Chart Share feature, how to import a CCR/CCD document, how to export/import a SOAPware chart, scanning options, and much more on Document and Chart Management, click the link provided.

[Link](#)

The screenshot displays the SOAPware Billing application window. The menu bar at the top includes SOAPware, Billing, Share, Edit, Tools, View, and Help. The main interface is divided into several sections. At the top, there is a dropdown menu for 'Active Provider' set to 'All Providers'. Below this is the 'Type of Export' section, which includes three radio buttons: 'Individual' (selected), 'Pulled Charts', and 'All Charts'. A 'Select' button is positioned next to the 'Individual' option. Below the radio buttons is the 'Search Dates' section, featuring 'Start Date' and 'End Date' fields with date pickers. The bottom section is titled 'Select Items' and contains a tree view of data categories: Advanced Directives, Billing Statements, Demographics, Documents, and CCR. The 'CCR' category is expanded, showing a list of items to export: Advanced Directives, Billing Statements, CCR, Correspondence In, and Correspondence Out. A 'Location -' field is visible at the bottom left of the interface.

## Document and Chart Management

[Continue to Step 9](#)

[Next Lesson](#)

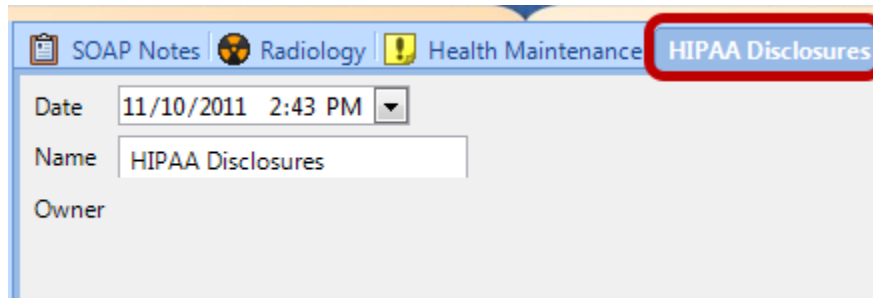
# Step 9

## HIPAA Disclosures

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For more information regarding the use of HIPAA Disclosures in SOAPware, click on the link provided.

**Link**



## HIPAA Disclosures

**Continue to Step 10**

**Next Lesson**

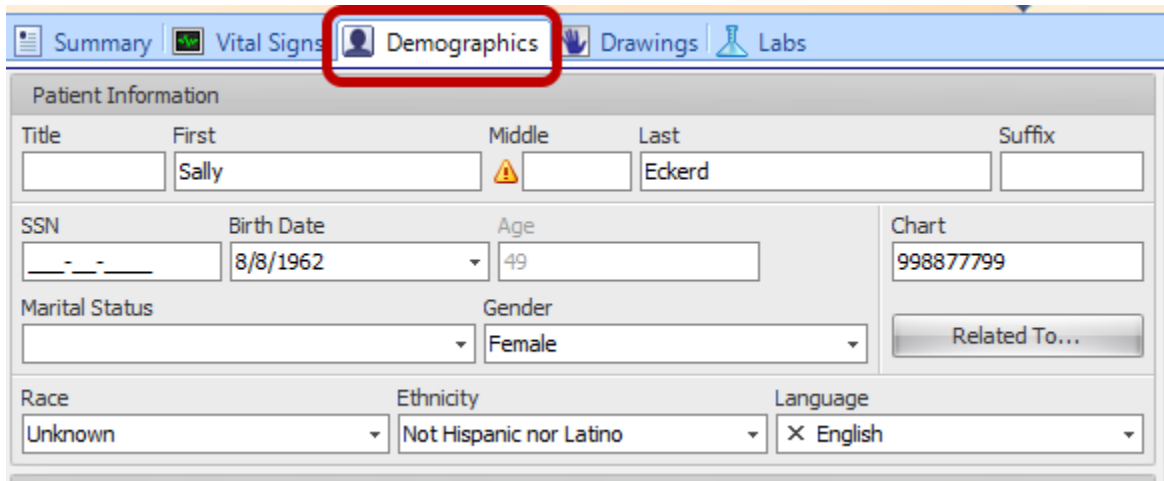


# Step 10

## Meaningful Use Core Requirements

For those Receptionists/Schedulers whose clinicians are participating in Meaningful Use, be sure to review the 2 links below to view his/her responsibilities pertaining to meeting these core requirements.

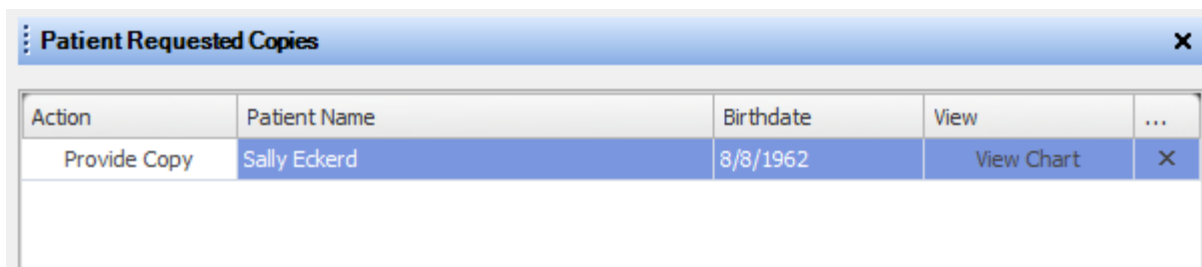
### 1. Record Demographics



The screenshot shows a software interface with a tabbed menu at the top. The 'Demographics' tab is selected and highlighted with a red rectangle. Below the tabs is a form titled 'Patient Information'. The form contains several fields: Title, First (Sally), Middle (with a warning icon), Last (Eckerd), and Suffix. Below these are SSN, Birth Date (8/8/1962), Age (49), and Chart (998877799). Further down are Marital Status, Gender (Female), and a 'Related To...' button. At the bottom are Race (Unknown), Ethnicity (Not Hispanic nor Latino), and Language (English).

To view this information see: [Entering Demographics](#).

### 2. Electronic Copy of Health Information



The screenshot shows a window titled 'Patient Requested Copies' with a close button (X) in the top right corner. Inside the window is a table with the following data:

Action	Patient Name	Birthdate	View	...
Provide Copy	Sally Eckerd	8/8/1962	View Chart	X

To view this information see: [Patient Requests Copies of Medical Records](#).

**Continue to Step 11**

[Next Lesson](#)

# Step 11

## Meaningful Use Optional Measure (5 out of 10)

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For those Receptionists/Schedulers whose clinicians are participating in Meaningful Use, be sure to review the link below to view his/her responsibilities pertaining to meeting this optional measure.

**Link**

For more information see: [Online Access for Patients](#).

# Practice!

## Schedule Hands-on Practice

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### Congratulations!

You have reviewed the SOAPware user manual materials related to the clinic role of "Receptionist/Scheduler". Now it's time to practice what you have learned!

We recommend that all users have sufficient time to be able to practice their workflows and become familiar with a new version of SOAPware prior to going live. It is essential that the clinic allow sufficient time for each of their staff members to practice. This will help them to become comfortable in navigating and performing their workflows in the new software and will make the transition from the previous version much more efficient.

If your clinic is interested in purchasing additional one-on-one training time with our SOAPware Certified Trainers, please review the information below on your SOAPware training options.

### SOAPware Training Options:

#### 1. Purchase Hourly EMR Training Session(s)

##### Hourly Remote Training

SOAPware offers hourly remote training sessions which are tailored around the topic or material of your choice. Whether you're looking for a quick overview of software features, a detailed instruction on Meaningful Use, or simply have a question that begins *How do I...*, these focused online lessons are designed to meet the specific training needs of your clinic.



##### Hourly Remote Training Services

**Product Options:** Clinical Training | Practice Management Training

**Training Hours:** Monday-Friday, 8a-5p CST

**Price:** \$150 per hour



[Purchase Training Sessions](#)



You can purchase EMR training in hourly increments. This type of training is conducted by remote training sessions, and is best utilized for training focused on specific areas of the SOAPware program. To purchase a training session, [click here](#).

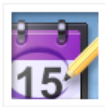
## 2. SOAPware EMR Workshops

### Clinical Workshops



Our comprehensive 2-day workshops provide a practical introduction to SOAPware 2011, from application features and functions to step-by-step instruction on proper Meaningful Use documentation. Our skilled training professionals combine direct instruction with hands-on exercises, ensuring maximum comprehension and retention. Upon completion, workshop attendees can expect to:

- Understand the basics of proper Meaningful Use documentation
- Identify new features in the SOAPware 2011 user interface
- Configure and maintain security settings
- Perform basic functions such as chart entries, ePrescribing, billing statements, and more
- Identify and address possible workflow changes
- Successfully train co-workers on the use of SOAPware EMR



#### SOAPware 2011 Workshop Schedule

**Available Dates:** September 23-24 | 8a-5p CST Sold Out!

**Location:** DOCS Professional Building | 4220 N Crossover Rd, Fayetteville AR 72703

**Price:** \$700 | 2-Day Package

[Register for Workshop](#)



For a more comprehensive clinic training for those who intend to train their staff on the SOAPware software, we recommend attending our workshop. [Click here](#) for more information!

### 3. Email your Questions

## Have Questions?

If you have questions about our training services or would like to receive more information, call us toll-free at 800.455.7627, Ext. 5 or submit the contact form below.

### Contact Training



Have a question about our Training services? The form below will email your question directly to our trainers, and you will receive prompt and personal attention.

Please note:

- Our Training Team will answer emails in the order they are received and most questions can be answered within 1-3 business hours.
- Emails received on Saturday and Sunday will be addressed on the following Monday.

Email your questions to: [trainersgroup@soapware.com](mailto:trainersgroup@soapware.com), and a certified trainer will get back with you! You can email us directly, or [click here](#) to fill out the contact form as shown above.