

Office Manager/Clinical Administrator Education Journey

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Office Manager/Clinical Administrator Education Journey

Introduction

A Note to the Office Manager/Clinical Administrator.....



This education journey is geared toward those with an office manager or clinical administrator position in the clinic. Office Managers and Clinical Administrators in most offices need to have a general working knowledge of all areas of SOAPware. We advise that Administrators and Managers review all areas of SOAPware to assist other users throughout the clinic. The Educational Journey for this role will focus on setup and creating items in SOAPware.

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

Welcome To SOAPware

To learn a little about SOAPware Resources, how to back up SOAPware data, and get an introduction to SOAPware, refer to the link provided below.

Link



Welcome to SOAPware

Continue to Step 2

Next Lesson

Step 2

2012 Terminology

This lesson will provide the user with an extensive list of glossary terms and definitions, which can be applied to our software.

Link

Glossary Terms

For more information see: [Glossary Terms](#).

Continue to Step 3

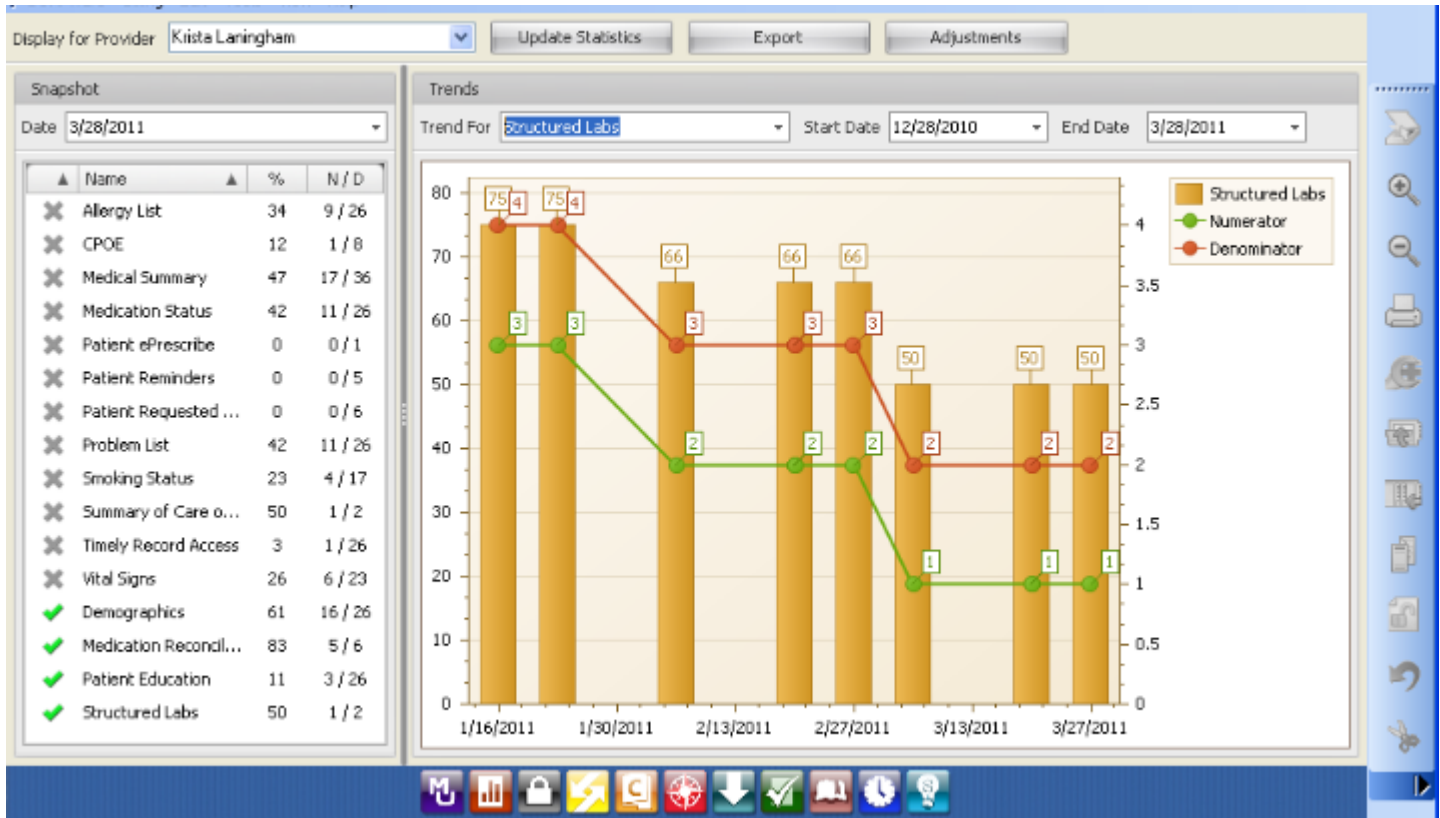
[Next Lesson](#)

Step 3

SOAPware 2012 New Features

The following 2 links will provide the user with knowledge on the new features of SOAPware 2012, as well as an overview of security changes in SOAPware 2011.

1. New Features of SOAPware 2012



New Features of SOAPware 2012

2. Overview of Security Changes in SOAPware 2011

Overview of Security Changes in SOAPware 2011

Continue to Step 4

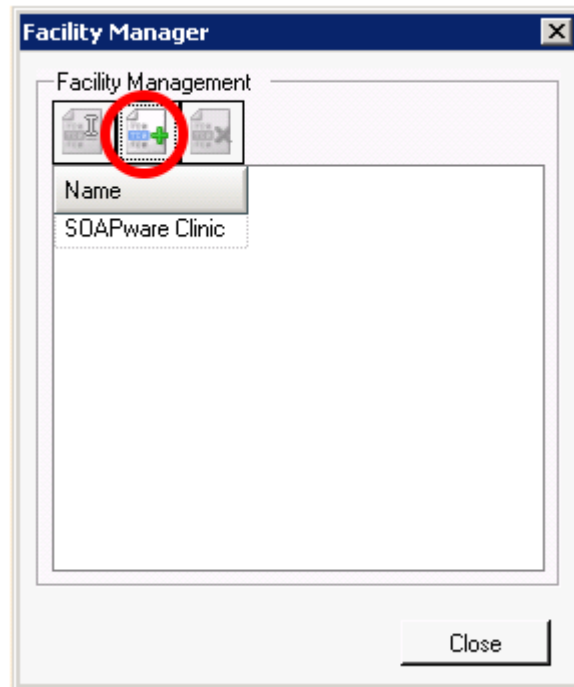
Next Lesson

Step 4

Setup

To learn more about setting up SOAPware, Provider Manager, Managing Facilities and more, refer to the link provided below.

Link



Setup

Continue to Step 5

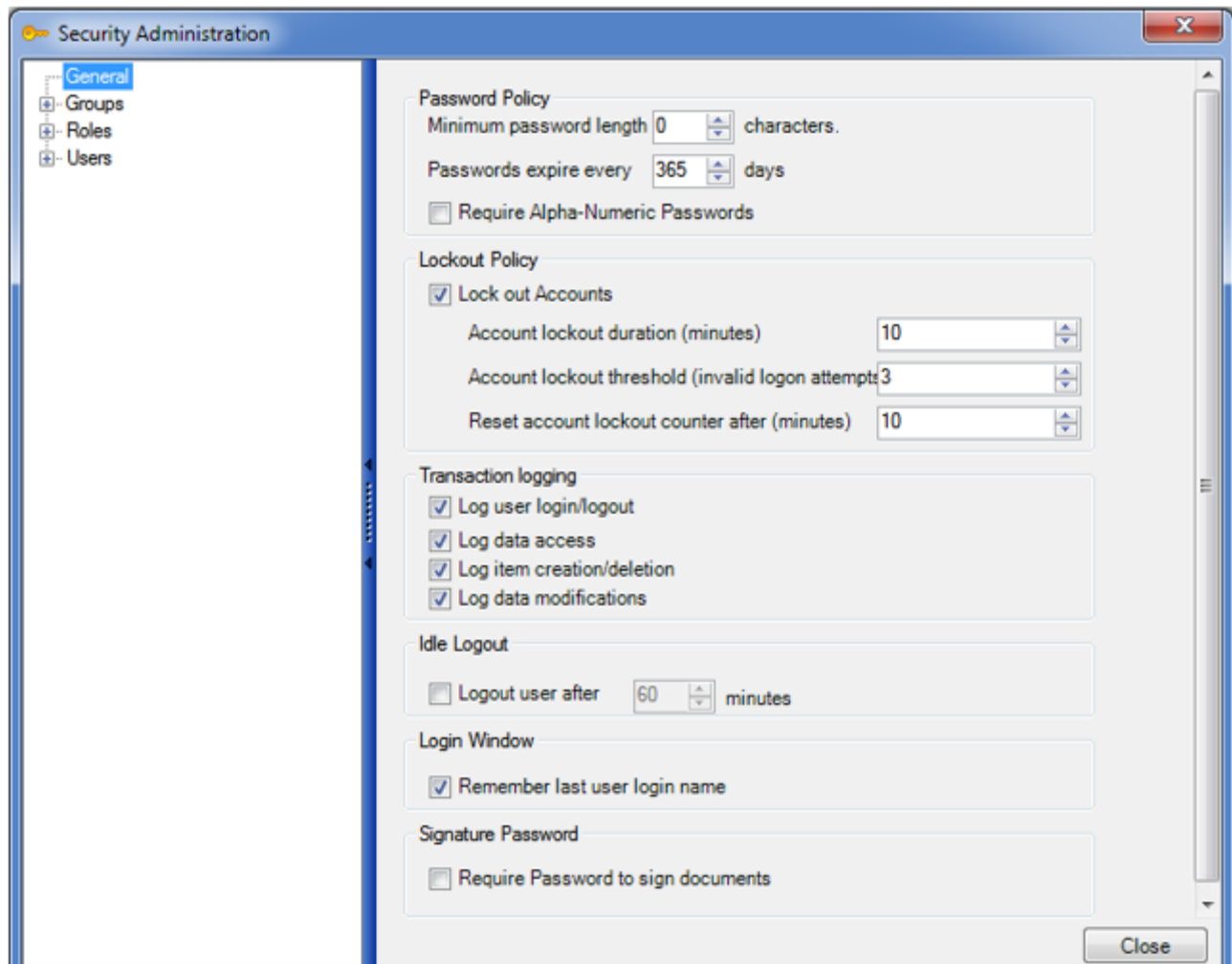
Next Lesson

Step 5

Security Settings

For more information on Security, deleting users, and Security Auditing in SOAPware, please see the link below.

[Link](#)



Security Settings

Continue to Step 6

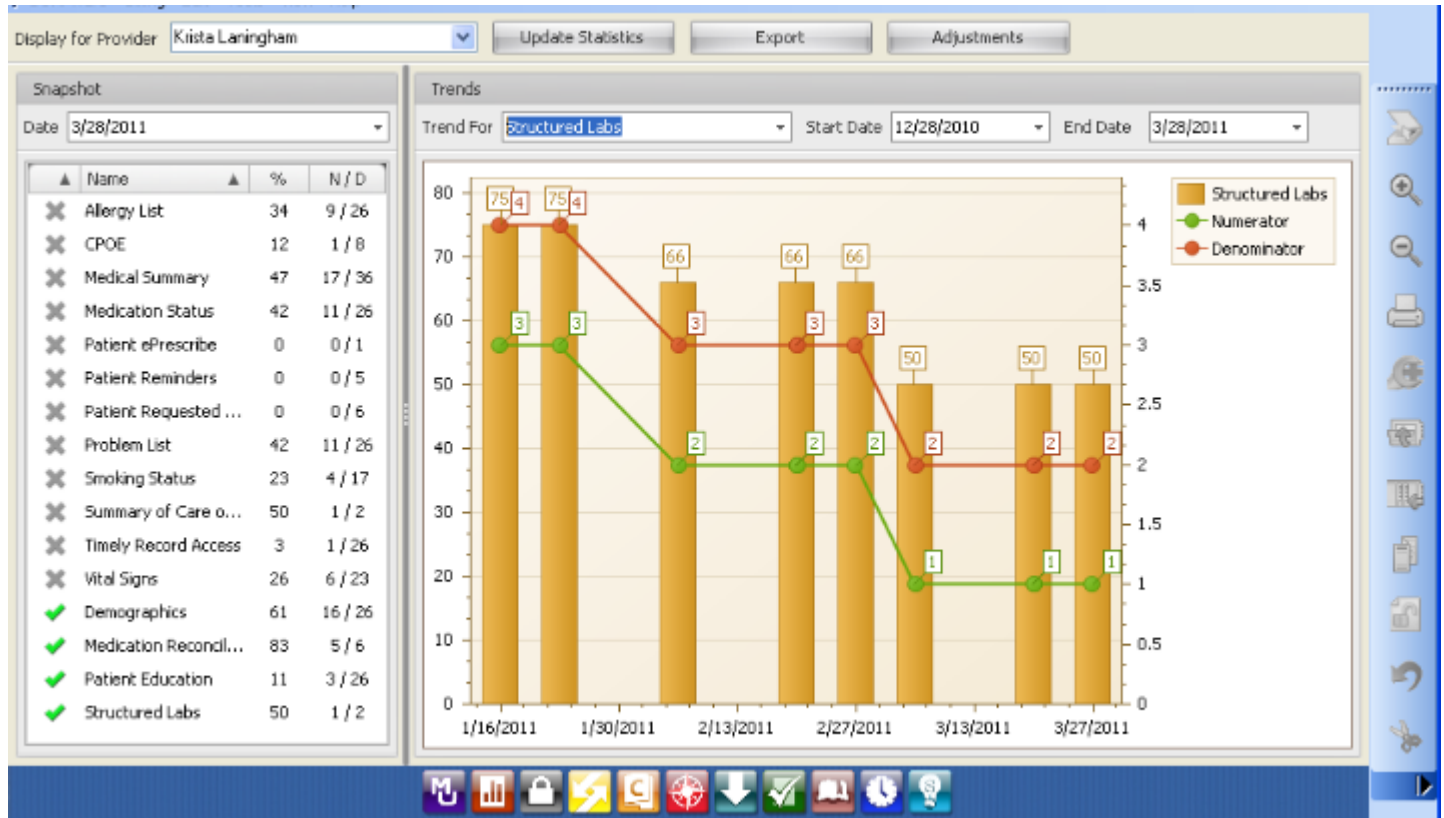
Next Lesson

Step 6

Meaningful Use Dashboard

In 2011+ versions of SOAPware, providers can now view, export and trend Meaningful Use usage statistics.

Link



Meaningful Use Dashboard

Continue to Step 7

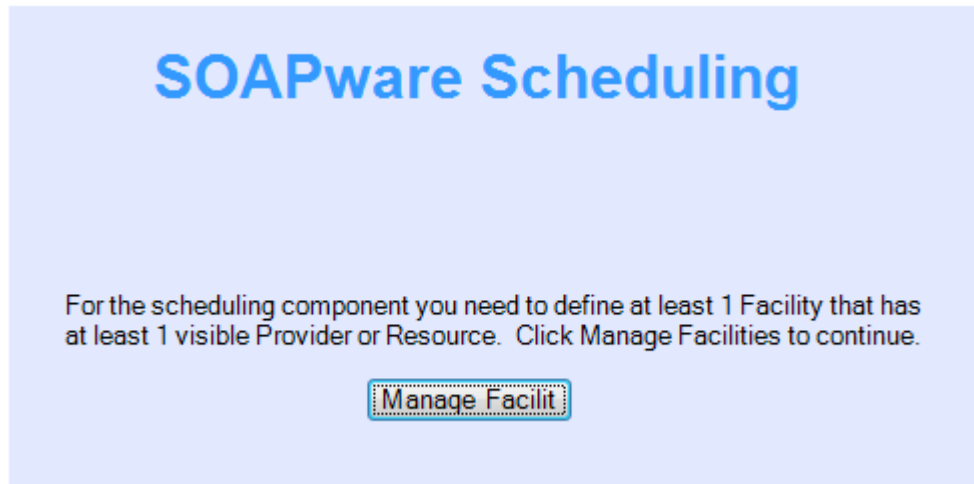
Next Lesson

Step 7

Schedule

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

1. Intro to Schedule



[Intro to Schedule](#)

2. Entering Facility Business Hours

[Entering Facility Business Hours](#)

3. Activate Providers/Resources for a Facility

[Activate Providers/Resources for a Facility](#)

4. Creating Holidays/Closings

[Creating Holidays/Closings](#)

5. Creating Scheduplicates

[Creating Scheduplicates](#)

6. Schedule Reports

[Schedule Reports](#)

Continue to Step 8

Next Lesson

Step 8

Workflow Considerations

To view lessons regarding workflow considerations on topics like Active Provider, Docu-Portal and changing settings, refer to the link provided below.

Link



Workflow Considerations

Continue to Step 9

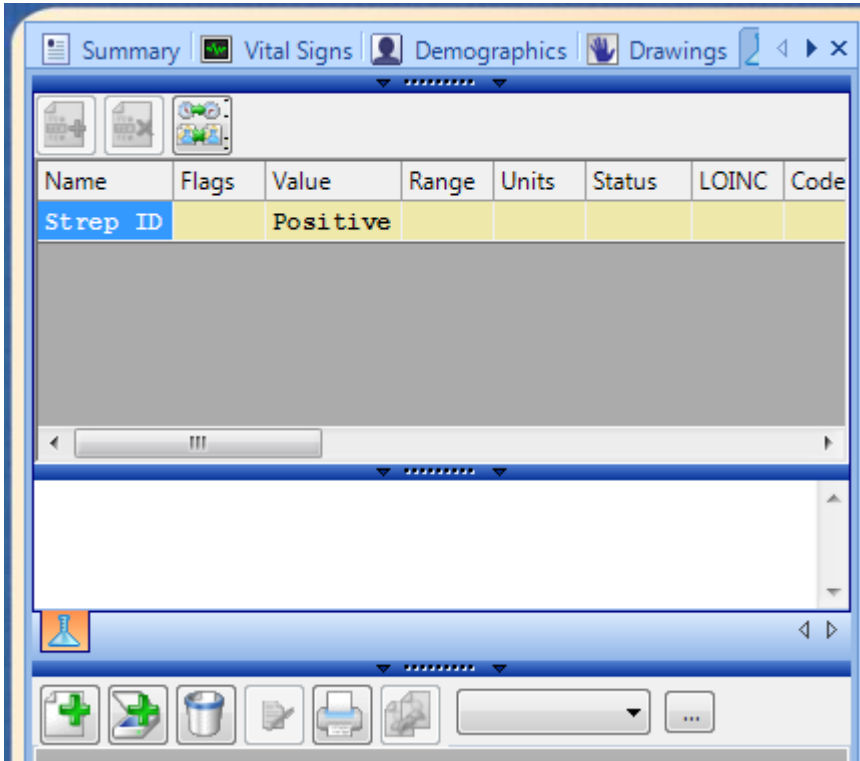
Next Lesson

Step 9

Labs

To learn about lab docuplates, creating and editing lab tests, HL7 labs and more, see the link provided below.

Link



Labs

Continue to Step 10

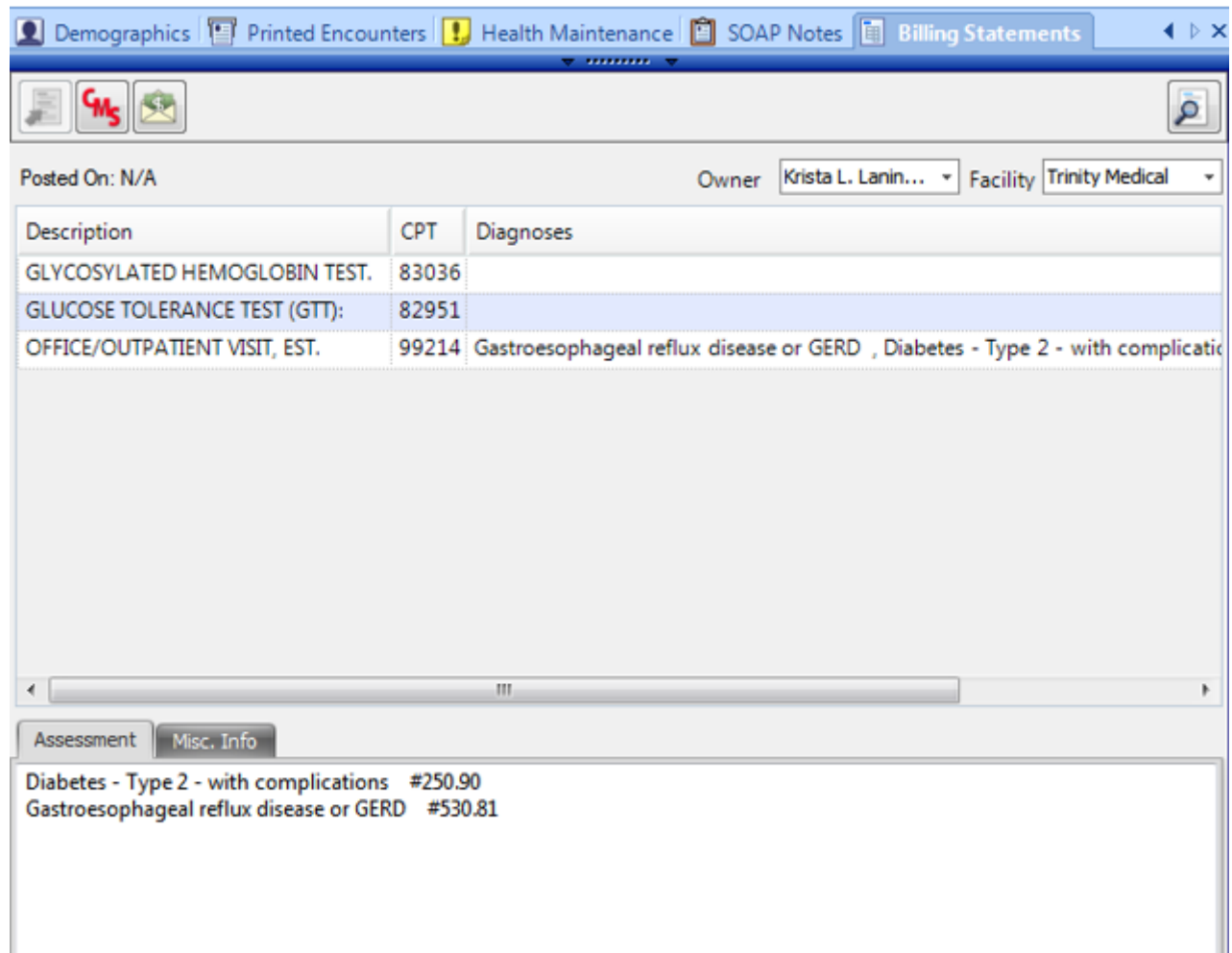
Next Lesson

Step 10

Billing Statements

To learn about creating and printing billing statements, refer to the link provided below.

[Link](#)



Posted On: N/A Owner: Krista L. Lanin... Facility: Trinity Medical

Description	CPT	Diagnoses
GLYCOSYLATED HEMOGLOBIN TEST.	83036	
GLUCOSE TOLERANCE TEST (GTT):	82951	
OFFICE/OUTPATIENT VISIT, EST.	99214	Gastroesophageal reflux disease or GERD , Diabetes - Type 2 - with complications

Assessment Misc. Info

Diabetes - Type 2 - with complications #250.90
Gastroesophageal reflux disease or GERD #530.81

Billing Statements

[Continue to Step 11](#)

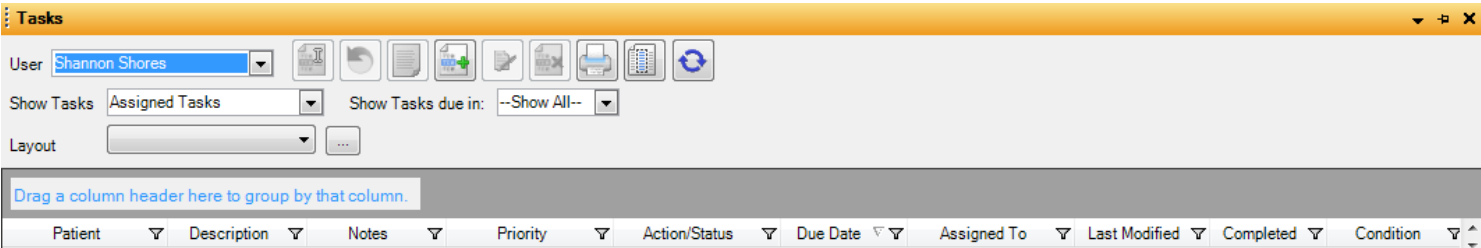
Next Lesson

Step 11

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 12

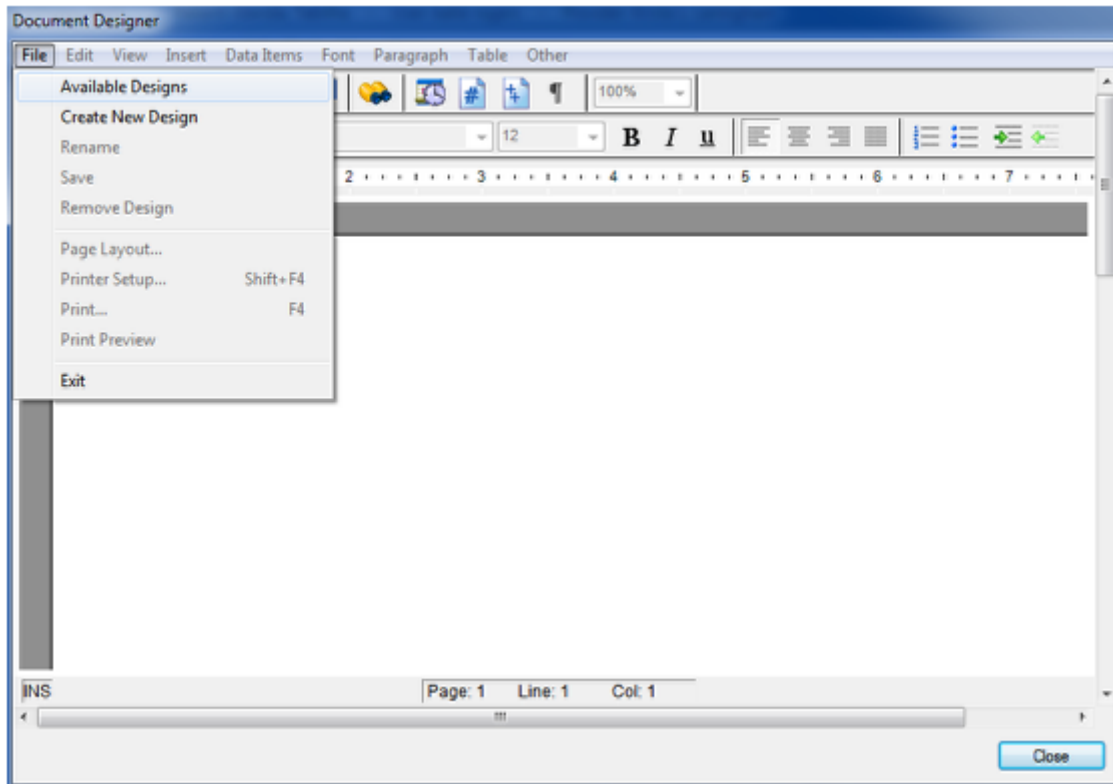
[Next Lesson](#)

Step 12

Document Designer

To learn about quick print key commands, how to create a basic document design, and many more topics regarding Document Designer within SOAPware, see the link below.

[Link](#)



Document Designer

[Continue to Step 13](#)

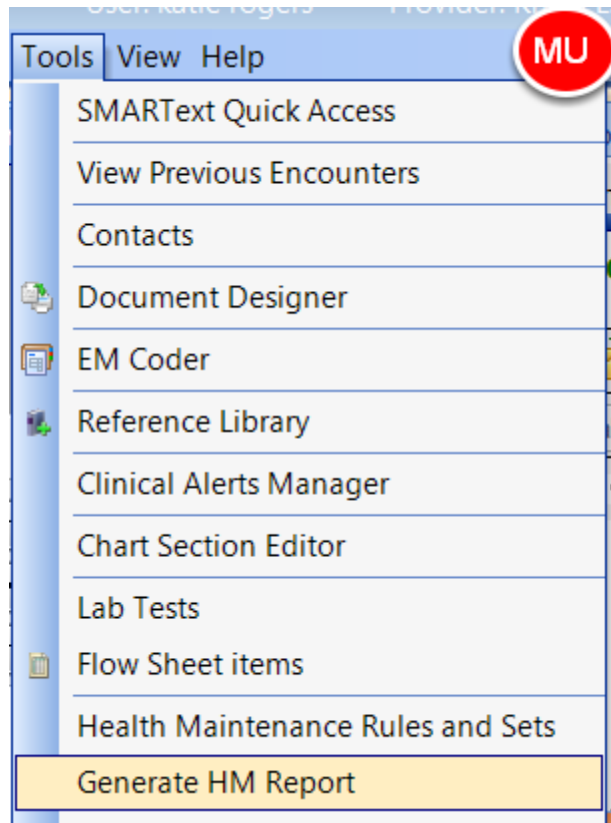
Next Lesson

Step 13

Generate a Health Maintenance Report

As a requirement for meeting Meaningful Use requirements, it is important to visit this link provided, as the user will be taken through the steps necessary to generate a Health Maintenance report.

Link



Generate a Health Maintenance Report

Continue to Step 14

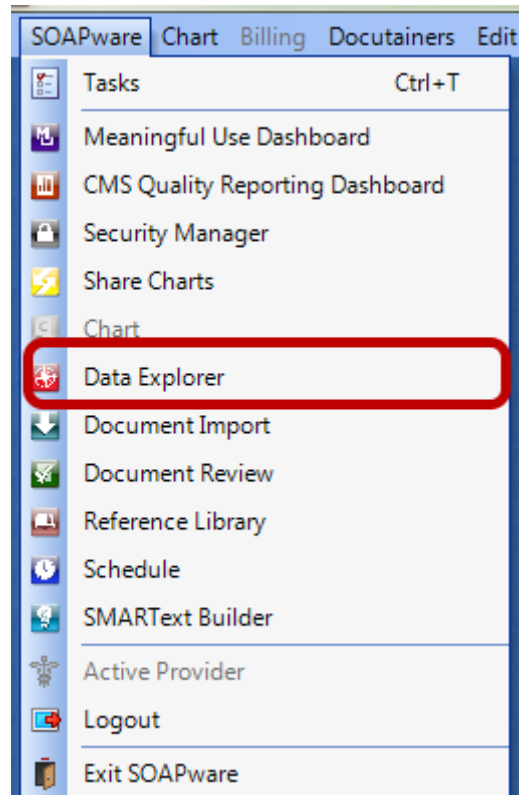
Next Lesson

Step 14

Data Explorer

To learn how to perform a medication search, and Summary diagnosis search, a lab value search, and more topics regarding Data Explorer, check out the link below.

Link



Data Explorer

Continue to Step 15

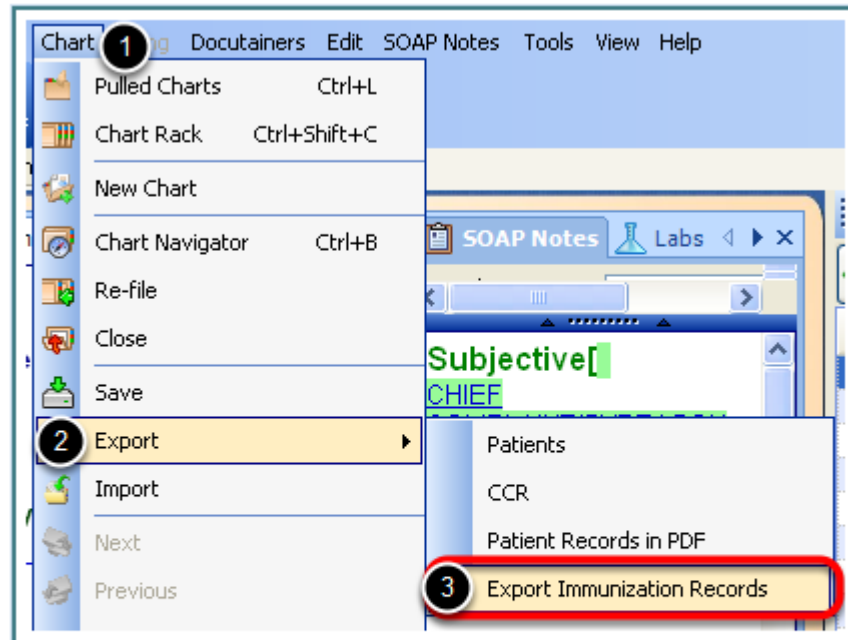
Next Lesson

Step 15

Submit Immunizations

This lesson is linked to information that will discuss how to export an immunization record, to then submit to a state registry.

Link



To Submit an Immunization Record:

1. Click on Chart.
2. Select Export.
3. Select Export Immunization Records.

Record and Submit Immunizations

Continue to Step 16

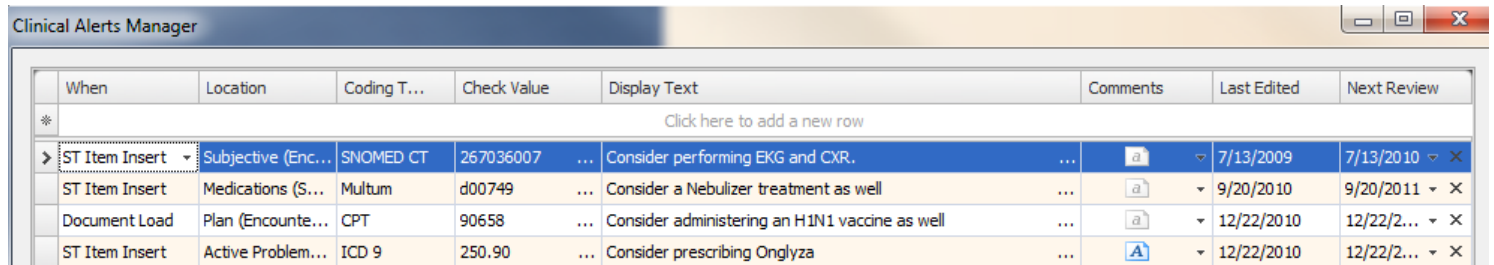
Next Lesson

Step 16

Clinical Alerts

Clinical Alerts are a simple way to have SOAPware display text-based prompts or reminders when a defined value is found in a specific location within the chart.

Link



The screenshot shows a window titled "Clinical Alerts Manager" with a table of alerts. The table has columns: When, Location, Coding T..., Check Value, Display Text, Comments, Last Edited, and Next Review. There are four rows of alerts, each with a dropdown arrow on the left. The first row is highlighted in blue.

When	Location	Coding T...	Check Value	Display Text	Comments	Last Edited	Next Review
ST Item Insert	Subjective (Enc...	SNOMED CT	267036007	Consider performing EKG and CXR.		7/13/2009	7/13/2010
ST Item Insert	Medications (S...	Multum	d00749	Consider a Nebulizer treatment as well		9/20/2010	9/20/2011
Document Load	Plan (Encounte...	CPT	90658	Consider administering an H1N1 vaccine as well		12/22/2010	12/22/2...
ST Item Insert	Active Problem...	ICD 9	250.90	Consider prescribing Onglyza		12/22/2010	12/22/2...

Please see: [Clinical Alerts](#).

Continue to Step 17

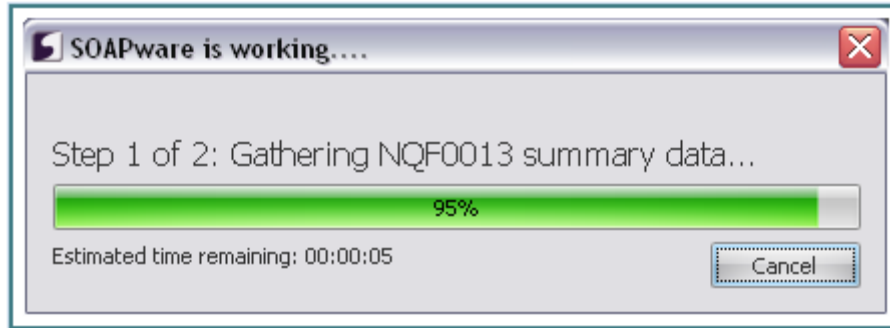
Next Lesson

Step 17

Clinical Quality Measures

To learn about Clinical Quality Measures in general, as well as how to use the CMS Quality Reporting Dashboard, refer to the link provided below.

Link



Clinical Quality Measures

Continue to Step 18

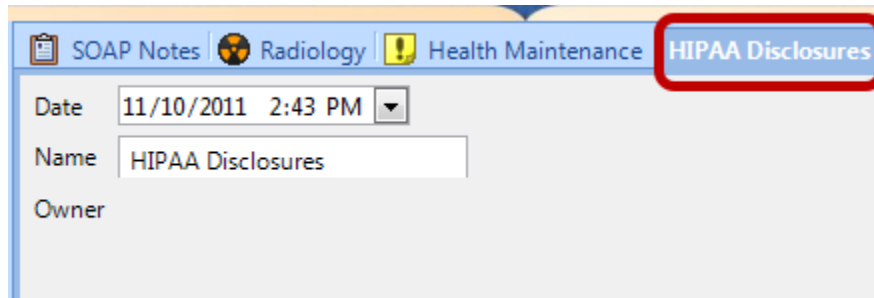
Next Lesson

Step 18

HIPAA Disclosures

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

Link



HIPAA Disclosures

Continue to Step 19

Next Lesson

Step 19

Meaningful Use for Office Managers and Clinical Administrators

The following 3 links will provide the user with helpful Meaningful Use information for those Office Managers/Clinical Administrators, whose clinicians are participating in meeting Meaningful Use requirements.

1. Introduction

Introduction

2. Registration and Attestation



Certified Health IT Product List
The Office of the National Coordinator for Health Information Technology
HealthIT.HHS.Gov

[Return to main search page](#)

CMS EHR CERTIFICATION ID

Your CMS EHR Certification ID is:

An eligible professional or eligible hospital that chooses to participate in the EHR Incentive Program must obtain a CMS EHR Certification ID. You may submit this CMS EHR Certification ID at the time of registration, but must submit this Certification ID as part of the attestation process for either the Medicare or Medicaid incentive program.

Please return to the [HHS.gov](#) site and enter this Certification ID when prompted for an "EHR Certification Number" on the appropriate registration or attestation screen.

YOUR CERTIFIED EHR PRODUCT(S)

The following products were used to obtain your CMS EHR Certification ID:

Certifying ATCB	Vendor	Product	Product Version #	Product Classification	Additional Software Required
CCHIT	SOAPware, Inc.	SOAPware	2011	Complete EHR	Surescripts, 4.20

Registration and Attestation

3. FAQ's

FAQ's

4. Meaningful Use Roadmap

SOAPware has created a helpful resource called the Meaningful Use Roadmap. This roadmap will guide eligible providers through the 15 Core Set Objectives and 10 Menu Set Objectives for Meaningful Use. The roadmap will walk the eligible provider step-by-step through the workflows required to meet the Meaningful Use objectives.

We would suggest that providers, who are participating in the Meaningful Use Incentive Program, bookmark the link to the Meaningful Use Roadmap for quick review as needed. To review the roadmap, please see: [Meaningful Use Roadmap](#).

Continue to Step 20

[Next Lesson](#)

Step 20

Meaningful Use Core Set Objectives (All 15 Required)

For those Office Managers/Clinical Administrators whose clinicians are participating in Meaningful Use, be sure to review the 5 links below to view his/her responsibilities pertaining to meeting these core requirements. Many of the items listed below require specific set up and a check of your security settings in SOAPware in order to meet the objectives listed.

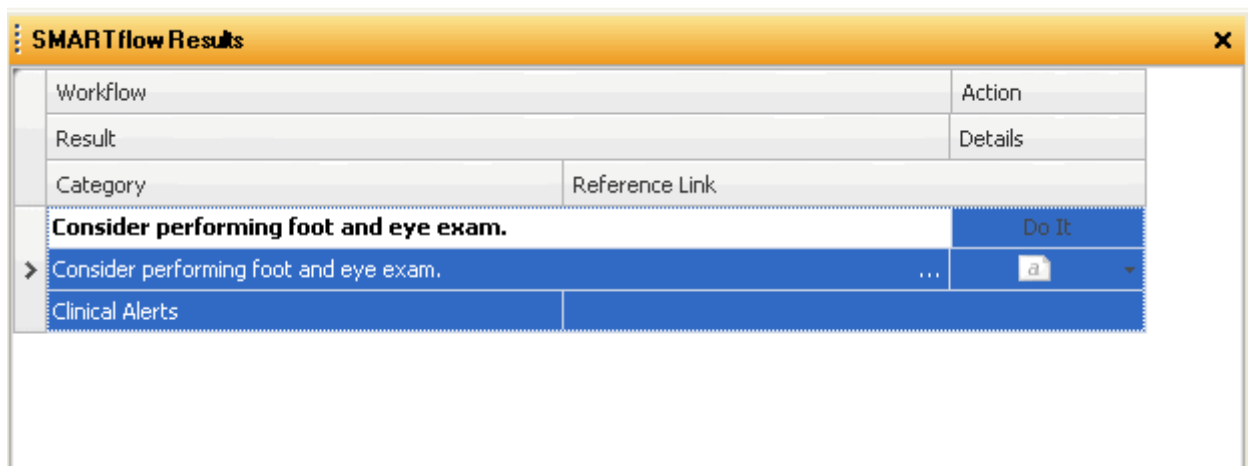
1. Drug Interaction Checks

Drug Interaction Checks

2. Electronic Exchange of Clinical Information

Electronic Exchange of Clinical Information

3. Clinical Decision Support Rule



The screenshot shows a window titled "SMARTflow Results" with a close button (X) in the top right corner. The window contains a table with the following structure:

Workflow	Action
Result	Details
Category	Reference Link
Consider performing foot and eye exam.	Do It
> Consider performing foot and eye exam.	...
Clinical Alerts	

Clinical Decision Support Rule

4. Protect Electronic Health Information

Protect Electronic Health Information

5. Report Clinical Quality Measures (CQMs) to CMS/States

Report Clinical Quality Measures (CQMs) to CMS/States

Review All Meaningful Use Core Objectives

In order for an eligible provider to meet Meaningful Use, the provider must complete all 15 of the Core Objectives.

To review the Meaningful Use Core Set Objectives, please see: [Core Set Objectives](#).

Continue to Step 21

[Next Lesson](#)

Step 21

Meaningful Use Menu Set Objectives (5 out of 10)

For those Office Managers/Clinical Administrators 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. The item listed below requires specific set up in SOAPware in order to meet the objective.

1. Patient Lists

Patient Lists	
Objective	Generate lists of patients by specific conditions to use for quality improvement, reduction of disparities, research, or outreach.
Measure	Generate at least one report listing patients of the EP with a specific condition.
Exclusion	No exclusion.

For more information see: [Patient Lists](#).

Review All Meaningful Use Menu Set Objectives

In order for an eligible provider to meet Meaningful Use, the provider must complete all 15 of the Core Objectives listed previously. In addition, the provider must choose 5 out of the 10 menu set objectives that have been defined by CMS.

(Note: At least one of the public health measures must be chosen, then any other 4 objectives can be chosen to complete 5 out of the available 10).

To review the Meaningful Use Menu Set Objectives, please see: [Menu Set Objectives](#).

Continue to Step 23-Practice!

[Next Lesson](#)

Practice!

Schedule Hands-on Practice

Congratulations!

You have reviewed the SOAPware user manual materials related to the clinic role of "Office Manager/Clinical Administrator". 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](#).

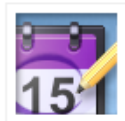
2. SOAPware EMR Workshops

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, 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.