

# AGENDA

## OMSVision Expert Series 2018

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9:00 am – 9:15 am	<b>WELCOME</b> - Introduction and agenda review
9:15 am – 10:45 am	<b>POSTING, PAYMENTS, ADJUSTMENTS &amp; THE LEDGER</b> Posting options (from the VSF, from the PIC TXP) Posting extras (claim extras, claim narratives, claim notes) Use of Speed Codes Payment options and how they affect the ledger (quick pay, line item, billing screen) Insurance payments and take backs, in detail
10:45 am – 11:00 am	<b>BREAK</b>
11:00 am - 12:30 pm	<b>POSTING, PAYMENTS, ADJUSTMENTS &amp; THE LEDGER</b> Adjustments and how they affect the ledger (non specific and line item) Adjustments (increase, decrease and negative cash flow) Understanding the ledger (legend, grey box, columns & summary buttons) Family ledger for easier ledger audits Ledger (new feature, overpayments legend)
12:30 pm – 1:30 pm	<b>LUNCH</b> (provided)
1:30 pm – 2:45 pm	<b>STAYING ON TOP OF YOUR ACCOUNTS RECEIVABLE &amp; CLAIMS</b> Report, Aging Report, Real Collection Analysis Report, Financial Report, Tabulated filtered to adjustments Statements (quick & regular) Report, Outstanding claims Report, Claim status Convert to patient balance utility
2:45 pm – 3:00 pm	<b>BREAK</b>
3:00 pm – 4:30 pm	<b>FEE SCHEDULE &amp; INSURANCE PLANS</b> Fee schedules versus UCR groups Importing to the master fee schedule Importing to the UCR groups Review of insurance profiles (PPO, Indemnity) Creating additional insurance forms Cleaning up insurance profiles (combine)
4:30 pm – 5:00 pm	<b>QUESTION, ANSWER &amp; OPEN GROUP DISCUSSION</b>

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9:00 am – 9:15 am	<b>WELCOME</b> - Introduction and agenda review
9:15 am – 10:45 am	<b>TREATMENT PLANNING</b> Review of the new features (plan tabs, units, copy) Phasing within a plan Changing and utilizing treatment plan statuses Entering preauthorization information
10:45 am – 11:00 am	<b>BREAK</b>
11:00 am - 12:30 pm	<b>FOLLOWING UP ON OUTSTANDING TREATMENT</b> Report, Work in progress Report, Cancellation list Recalls (report system versus reminders) Call list
12:30 pm – 1:30 pm	<b>LUNCH</b> (provided)
1:30 pm – 2:45 pm	<b>MASERTING NARRATIVES</b> Merge field options Editing E.H.R. tables Utilizing extra features (spell check, text boxes, images, tables, headers & footers) Backing up and/or locking properties on your narratives
2:45 pm – 3:00 pm	<b>BREAK</b>
3:00 pm – 4:30 pm	<b>EXPLORING THE NEW FEATURES</b> Versions 15 through 16  <b>EXPLORING ADD ON MODULES</b> SIMPLIFEYE for a mobile solution and information sharing with referring doctors TSYS for a merchant solution EXPRESS BILL for electronic statements DIGITAL SIGNATURES with tablets or pads for various areas throughout software IMPLANT TRACKER for inventory control, tracking and reports eRX for electronic prescriptions, drug interactions and updates TRUFORMS for online new and existing patient paperwork
4:30 pm – 5:00 pm	<b>QUESTION, ANSWER &amp; OPEN GROUP DISCUSSION</b>