

TRAINING CHECKLIST

CHECK IN

In ECLiPS:

HOME PAGE:

- Review Key Components Of The Home Page
- Print Glance Sheet
- Add A Note

SCHEDULER TAB:

- Book An Appointment
- Reschedule An Appointment
- Cancel An Appointment
- Send Digital Intake Form
- Check In A Patient
- Manually Complete DIF
- Review The Patient
- Communication Preferences
- Review TAB Symbols
- Review TAB Reporting

PATIENTS TAB:

Summary

- Edit Patient Demographics
- Acknowledge HIPAA & Financial Signatures
- Add A Note
- Review & Print Glance Sheet
- Add Preferred Provider
- Change Communication Method

Details

- Review How It Could Be Used In The Office

Insurance

- Add Insurance To Patient File
- Enter New Benefit Request
- Link To Appointment
- Edit Primary Info
- Delete An Insurance Plan

Patient Documents

- Scan In Insurance Card, Benefit Summary, Or Any Other Document
- Review A Previous Document

Patient Transactions & Ledger

- Review How It Could Be Used In The Office

EHR:

Documents

- Upload Exam Documents For OD
- Prepare Legacy Documents
- Print RX