

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