Title: ICP – Onboarding Training Checklist

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Purpose

To provide all clinical new hires a complete overview of the charting functionalities within ICP.

Summary, Demographics, and Insurance

- How to Search for a patient in the Workflow
- Search for a patient's name vs Patient ID vs DOB
- What default information shows on the patient summary screen
    - Chart Summary
    - Problem List
    - Encounter Summary
    - Integration Links
    - Appointments
    - Where to edit user changeable fields
- Understanding the importance of each field
- Navigate to Demographics
    - How language, race, and ethnicity populates/how to edit
    - How to enter contact preference
    - How to enter Referring and Primary Physicians
    - How to designate Referring vs Primary physicians
    - Use of General Notes

- Navigate to Insurance/Authorization
    - Entering Insurance Notes/Authorizations

Procedures

- How to add/edit Procedures
- What information is displayed from IntelleChart Encounters

Shared Care (For Admin/Providers)

- How to initiate a share
- How to receive a share
- How to terminate/delete a share

Rx

- Ocular Meds
    - How/when to add Medication from the Summary
    - How to view patient's ocular medication

    - How to open eRx
    - How to print eRx
- Refractions
    - How to view refractions
    - How to print glasses
    - How to print contact lens Rx

Communication

- Understanding the Difference in Types of Communication – Patient, Internal, Secure, Referrals
- Which Communications Can Be Extracted for A Court of Law
- Patient Communication
    - How to add patient communications
    - How to prioritize
    - How to notify staff
    - How to Follow-up
    - How to resolve
- Internal Communications
    - How to add internal communications
    - How to prioritize
    - How to notify staff
    - How to delete communication
- Secure Messages
    - Understanding how messages are generated
    - How to read, respond, and resolve these messages
- Referrals
    - How to create referrals
    - Communication with the referral physicians
    - How to "Close the Loop"
    - The importance of closing the loop
    - How does referrals and referring physicians differ

Studies

- How to Select/Add Studies
- How to Document the Diagnosis For A Study
- How to Indicate the Ordering Physicians
- How to print Rx for studies
- How to document study results

- How to update the status for a study

Consents

- What documents are available for signature in this tab
- How to view consents signed in IntelleChart
- How to add/edit/delete a consent
- How to print consents

Images

- Types of Images Are Typically Found in Images Tab
- How to Upload Images
- How to Select/Arrange Images for Viewing
- How to Draw Annotation on Images
- How to Select Images for Insertion into Encounter
- How to Manage Images
    - View in PDF
    - Print images
    - Delete Images

Documents

- How to Add/Edit Intellefile Categories and Subcategories
- Which Uploads Appear in Documents Vs in Images
- Document Scanning and Uploading
    - Import vs Browse
- How to Edit Documents
    - Delete Files
    - Delete Single Page

Reports

- Understand What Information Is Available
- How to Select an Encounter Date
- How to Select A Report for Viewing
- How to Print/Fax
    - A single report
    - Multiple reports

Portal

- Understand What Information Is Available
- Create and Print Portal Sign-Up for A Patient
- Document Requests for Electronic Records
    - Date requested and sent
    - Format in which information was transmitted

IntelleChart Pro

- How to Access A Patient's Chart
    - From the Patient Summary Screen
    - From the Workflow
- What Information is Available in Banner
- What Defaults Display in Header
- How to Change Information Displayed in Header
- How to View Additional Encounter Information in Header
- What are the functions of and difference between
    - Encounter Notes
    - Treatment Notes
- What functions are found under the "Tools" gear

Creating an Encounter

- How To Create an Encounter
- Selecting an Appointment Type
    - What makes appointments display in encounter detail
    - How to link an encounter to an appointment
- How to edit encounter information
- How to select alternate encounters to populate exam findings
- How to select a CCD for reconciliation

History

- Differentiating Between Reason for Visit and HPI
- How to Edit the Reason for Visit
    - Editing the free text field
- Search for Diagnosis/ Problem List Item
    - Indicate Primary Dx vs Secondary Dx
    - Reorganizing Diagnosis/ Problem List Items List
- Understanding the Importance of Collecting a Proper HPI
    - Understand CC and use of Elements of HPI

- Understanding the Use of Extended HPI
    - What Classically Gets Used in Extended HPI
    - MU Implications for Documenting Mental Status and Blood Sugar, HA1c
- Documenting Ocular Medication
    - Using the Search Inventory Icon
    - MU Requirements for Documenting Medication Reconciled and Review of Systemic Meds

Past Systemic Family History (PSFH)/ Review of Systems (ROS)

- How to Complete Each Field
- How to Search for Systemic Medications
    - How to Upload Medications from Dr First

Vision & Pressure (V&P)

- How To Select Refraction Types And Record Multiple Types
    - How to Select and Sign Prescriptions
    - How to Document Fit on Contact Lens
    - How to Add Additional Notes to Glasses/CL Prescriptions
- Understand How to Access Special Testing
- Understanding How to Document A Special Test Was Measured
- How To Interpret Each Special Test

Exam

- How to Select Eye(S) To Be Examined in External, Gonio, Anterior, And Posterior Segments
- How to Populate or Remove Default Findings
- How to Indicate If an Element Is Not Performed in This Encounter
- How to Search For/Edit Findings
- How to Add Diagnoses to The Problem List from The Findings
- How to Select Drawing Backgrounds, Draw, And Insert Drawings

Diagnostics

- How to insert diagnostic Images into the chart
- How to select/add/remove diagnostic tests
    - Indicate eye(s) to be tested
    - Link Diagnosis to each test performed
- How to interpret a diagnostic test

Procedures

- How to search for a procedure
- How to indicate the number in a series of treatments
- How to select location for procedure
- How to select and edit a linked diagnosis
- How to obtain a consent for a patient
- How to complete Expiration date/Lot Number/Inventory fields
- How to Add or edit a procedure note

Imp/Plan

- How to re-order a diagnosis and indicate a diagnosis is primary
    - From the examination screen
    - From the Problem List item screen
- How to add/delete/hide a diagnosis
- How to provide patient education materials related to diagnoses
- How to order studies
- How to refer a patient to another practitioner
- How to populate default discussions
- How to search for discussions
- How to provide Tech Instructions
- Follow up
    - How to create a follow up
    - How to add multiple diagnoses and a possible procedure to a follow up
    - How to select a previous encounter follow up
    - How to add additional follow up encounters
    - How to communicate follow up information to a specific staff member
- Ocular Meds
    - How to add/discontinue medications
    - How to send an eRx

Letter

- How To Indicate To Whom A Letter Should Be Addressed To
- How To Indicate Who Will Be Cc'd On The Letter
- How To Select The Letter Type
- How To Edit What Information Should Be Placed Into The Letter
- How To Insert Images And Drawing Into The Letter
- How To Sign And Send The Letter

Coding

- How to select the level of service
- Understand predictive charting
- How to recognize and correct missing service and diagnoses in displayed elements
- Adding missing elements by selecting CPT and linking ICD(s)
- Add modifiers
- Understand Coding Complete and Submit on Coding Complete

Review of Admin

- How to access Admin section
- How to return to Workflow
- How to connect to Support

My Settings

- Understand the elements found under My Settings tab
- How and what can be edited in each field

Practice Data

- Understand what information is found under each element
- Fax
    - How to look at statuses of faxes
    - How to find the reason why faxes had failed
- Contacts
    - Understand how the contacts are populated dependent upon PM System
    - How to create a new Contact
    - How to edit an existing Contact
- Logs
    - Understand the functions of each Log
    - How to view Log information
- Patients
    - Understand the information in each section
    - How/when to close Open Patient Charts
    - How to Merge patients with duplicate records
- Other List
    - Understand what information can be added/edited in each section
- CMS Regulatory Reports

    - Understand what reports can be made available
    - How to queue reports
    - How to retrieve reports
- Alerts
    - Understand the use of the Alerts in IntelleChart Pro
    - How to set alerts
- Reports
    - Understand each report that can be generated
    - How to set parameters for each report

Practice Settings

- Know what information is contained in the Practice Settings tab and how to edit the most commonly used elements
- How to set IOP alerts
- Workflow
    - How to add/edit tasks
    - How to set colors for tasks in the workflow
- Users
    - How to add/edit/lock non-physician users
- Permissions
    - How to grant non-standard Permissions for users
- Superbill Rules (For Admin/Providers)
    - How to set up rules

Knowledge Base (For Admin/Providers)

- Understand the basic workings of Knowledge Base Filtering

Revision History

Revision	Date	Changes	Requested By
V001	6/24/2020	Initial Release	