

# Care360 Practice Management Training

## What to Expect



Care360 Practice Management training is customer driven, meaning that you will need to attend web-based, interactive training webinars. The training and setup process can be completed in a six to eight week period. You will have the opportunity to register for the first training session during your initial welcome call.

For questions about your Care360 Practice Management training please call 800.697.9302, Option 6, Option 2 or email [MedPlusSupport@medplus.com](mailto:MedPlusSupport@medplus.com).

### **Step 1: Welcome Call (Week 1)**

To begin the implementation process, a Care360 Practice Management trainer will call you within two business days following your initial EHR trainer call. During the welcome call you will:

- Talk with a trainer about the implementation process.
- Register for training webinars. Following the call you will receive confirmation of your training schedule by email.
- Obtain your Care360 Practice Management login information.

### **Step 2: Getting Started (Week 1)**

Attend the webinar “Introduction to Care360 for Practice Management and Billing”, available live or pre-recorded. This webinar is an introduction to the software, training process and support resources. It includes a demonstration of the Care360 Practice Management workflow and an opportunity for initial questions.

After this training session you will:

- Download the Care360 Practice Management application and login.
- Use the setup wizard to enter information about your practice, providers, service locations, contracts and users.

### **Step 3: Enrolling in the Electronic Services (Week 2)**

Attend the webinar “Enrollment for Electronic Services”. Attending this webinar is required as it explains the electronic services provided and the necessary steps to enroll in these services.

After attending this webinar you will:

- Find Payers and Get Enrollment Agreements at [kareo.com/support/enrollment/payer-search](http://kareo.com/support/enrollment/payer-search)
- Submit a Web Enrollment Request Form to Care360
- Begin the “Patient Identification (PID) Reassignment” and “Insurance Mapping” process described below:

#### **PID Reassignment**

If you have existing patient records, they must be imported into Care360 Practice Management through a Patient ID (PID) Reassignment. PID Reassignment must take place before Care360 Practice Management integration can be activated. You will be assisted by a Care360 Support Representative. It is highly recommended that you start the PID reassignment process now and complete your first four webinars while you complete these steps so that you are fully trained to use Care360 PM to manage patients and appointments. To complete your PID Reassignment:

- You must resolve all duplicate patient and unassigned clinical data issues in the Care360 EHR.

- After resolving duplicate patient issues, notify a Care360 Support Representative by emailing [MedPlusSupport@medplus.com](mailto:MedPlusSupport@medplus.com).
- A Care360 Support Representative will contact you to schedule the PID Reassignment. Reassignment can take three to five business days.
- Once complete, you will be notified that your Care360 Practice Management integration has been activated.

### **Insurance Mapping**

A Care360 Support Representative will guide you in completing insurance company mapping between Care360 Practice Management and Care360 EHR. Once insurance companies and plans have been added, mapping will take place. It is highly recommended that you complete Webinars 210, 300 and 400 before scheduling your Insurance Mapping to be completed so that you are fully trained to use Care360 Practice Management to manage insurances.

#### **Step 3: Completing the Setup (Week 2)**

Attend the webinar “Completing the Setup”. This webinar is required as it provides information about administrative configurations in Care360 PM needed to complete the initial setup: Practice information, service locations, provider records, fee schedules, and insurance companies and plans. This session also prepares you for insurance mapping between systems if applicable.

#### **Step 4: Entering Patients and Insurance Information (Week 3)**

Attend the webinar “Entering Patients and Insurances”. During this session you will learn how to enter patient, case and insurance records as well as add documents and tasks.

#### **Step 5: Appointment Scheduling (Week 3)**

Attend the webinar “Appointment Scheduling”. This session will teach you how to create appointments and other tasks in the appointment scheduler. At this point, you’ll be fully trained to use Care360 Practice Management to manage patients and appointments. If you are a Level 1 or Level 2 customer, your training is now complete. If you are a Level 3 or Level 4 customer, finish Steps 6-8. If you are unsure of your level, contact Practice Management support at 800.697.9302, Option 6, Option 2.

#### **Step 6: Reviewing and Approving Charges (Week 4)**

Attend the webinar “Reviewing and Approving Charges” to learn about reviewing charges and converting them into billable claims as well as how this information transfers from the Care360 EHR to the Care360 Practice Management.

#### **Step 7: Sending Claims and Reviewing Clearinghouse Reports (Week 4)**

Attend the webinar “Sending Claims and Reviewing Clearinghouse Reports”. During this session you will learn how to correctly submit electronic claims and print paper claims as well as how to interpret clearinghouse reports. After this webinar you will be asked to submit a claim to an insurance company and ensure it is successfully received.

#### **Step 8: Posting Payments (Week 6-8)**

Schedule your final training session “Posting Payments” which covers the last step in the revenue cycle. After receiving a claim you have submitted through Care360 Practice Management, email [MedPlusSupport@MedPlus.com](mailto:MedPlusSupport@MedPlus.com) with a request for “Webinar 700Q – Posting Payments” and we’ll provide you with the registration link. One-on-one training sessions are offered for this subject in lieu of the normal live webinar format to ensure your protected health information stays secure. After this webinar you will post a payment and your Care360 PM implementation will be complete.

# Care360 Practice Management (PM)

## Training Curriculum



### Webinar 100Q – Getting Started

This is a brief introduction to Care360 Practice Management and beginning the setup process by completing the Practice Setup Wizard.

- Care360 EHR & PM functionality
- Contacting Support
- Completing the Setup Wizard

### Webinar 200Q – Enrollment for Electronic Services

Learn what you'll need to do to quickly enroll for electronic services, including the ability to submit electronic claims, verify eligibility, and receive ERAs, with both your clearinghouse and individual payers like Medicare and Medicaid.

- Electronic Services Offered
- Completing Web-Enrollment Request
- Finding Payers and EDI Agreements

### Webinar 210Q – Completing the Setup

Get in depth training on how to set up your first practice in Care360 PM, setting up Care360 PM for electronic claims processing, and other administrative configurations.

- Practice Record Setup
- Provider Record Setup and Overrides
- Configuration of Electronic Claims Setup
- User Accounts
- Service Locations Setup
- Insurance Company and Plan Setup
- Contract/ Fee Schedule Setup

### Webinar 300Q – Entering Patients and Insurance Policies

Learn how to enter and edit patient and insurance records to keep your data up-to-date.

- Creating a Patient Record
- Patient Alerts
- Linking Documents to Patient Records
- Patient Cases and Insurance Policies
- Reviewing the Patient's Account
- Creating and Managing Tasks

### Webinar 400Q – Appointment Scheduling

Join this webinar to learn how to setup your calendar, how to create and edit appointments in the appointment scheduler.

- Setting up the Scheduler
- Scheduling a Non-patient Appointment
- Time Blocks
- Printing Appointments
- Scheduling a Patient Appointment
- Double Booking Appointments
- Changing Appointment Status

### Webinar 500Q – Encounters: Reviewing and Approving Charges

Everything you need to know to capture charges and convert them into billable claims.

- Entering Billing Details in EHR
- Finding Draft Encounters/ Charges
- Customizing the Encounter Layout
- Reviewing the Encounter Status
- Sending Billing Details from EHR to PM
- Reviewing Encounters/ Charges
- Approving Encounters/ Charges

### Webinar 600Q – Sending Claims and Reviewing Clearinghouse Reports

Become a claim submitting wizard by learning how to use Care360 Practice Management's claim submission features and how to understand clearinghouse reports.



- Steps to Submitting Electronic Claims
- Reviewing & Tracking Claim Status
- Tips to work Rejections and Denials

- Printing Paper Claims
- Reviewing & Understanding Clearinghouse Reports

### **Webinar 700Q – Posting Payments and Patient Statements**

Get one-on-one training, ensuring your protected health information stays secure, on the last step in the revenue cycle, posting the payments you're receiving.

- Manually Post an EOB
- Posting Patient Payments
- Printing On Demand Patient Statements

- Posting an ERA
- Submitting Electronic Patient Statements
- Contacting Support after Training