ID&T Course Catalog

Software Name, V1.1
Prepared by Instructional Design & Training
April 15, 2010

Contents

Patient Centric Information Solution (PCIS) Overview.

Introduction

USF Health continues its journey towards national prominence with the opening of the new Centers for Advanced Healthcare. USF Health also maintains its process of implementing enhanced information technology systems.

Patient Centric Information Solution (PCIS) allows you to log into one application to access both GE and Allscripts functionality. This provides an efficient, streamlined workflow for patient care.

To support the Dean's mandate to achieve 100% physician compliance in the use of a feature-rich, fully functional Electronic Health Record (EHR), efforts are well underway with the implementation of the Allscripts TouchWorks EHR. As part of this process, the organization is moving forward with an aggressive timeline to achieve a "paperless" environment. The focus of the EHR is to enhance the patient experience and provide improved automation and functionality to the physicians, physician extenders, fellows, residents, medical students, and clinical and non-clinical support staff.

USF Health IS Instructional Design and Training

In order to formalize and standardize the employee training process, the Department of Education and Training was developed in November 2006 and merged with USF Health IT in February 2008 forming the group Instructional Design and Training (IDT), as part of the new USF health information Systems. The purpose of the department is to provide consistent, high-quality training to USF Health employees. Currently, we provide free training classes to all faculty, staff and medical students on the new version of the GE Healthcare / IDX Flowcast patient information system the implementation of the Allscripts Touchworks Electronic Medical Records application which is all part of the Patient Centric Information Solution (PCIS) Project, Microsoft Office training and any training for USF HEALTH IS initiatives and applications such as HART, CREST, Checkbox and others.

Should you have any further questions, please do not hesitate to contact the Department of Instructional Design and Training staff:

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Training Registration Process

In order to ensure that all faculty and staff receive the appropriate training and corresponding system security access in a timely manner, please adhere to the following procedures listed below. Should you have any questions regarding the training schedule, course catalog, security access or form completion, please do not hesitate to contact us at (813) 396-9587.

TRAINING REGISTRATION PROCEDURES

1. Review the Course Catalog. The Course Catalog contains all the necessary information regarding course descriptions, intended audience, pre-requisites, course objectives and corresponding Roles/Rights.

2. Identify the appropriate training class(es) for the employee(s).

3. Complete the Training Registration Form, including preferred class date and time, and fax to the ID&T at 813-396-9619 or scan and email to dfrederi@health.usf.edu, chuber@health.usf.edu; **and** lboothma@health.usf.edu .

Note: If the schedule does not offer a class close to the new employee's start date or in the desired location, please contact our department to see if alternative arrangements can be made. We will do our best to accommodate special requests, resources permitting.

PCIS ACCESS REQUEST PROCEDURES

1. **An HSC account is required in order to obtain PCIS access**. The standard turnaround time for an account to be setup is 72 hours once the request has been approved, so please consider this when determining start dates for your new staff members. HSC access is a web based application that is located at on the Health IS homepage. Please see the link below to access this; **https://hsccf.hsc.usf.edu/support_desk/new_account/account_request_step_1.cfm**
2. Complete the PCIS Security Access Request form and the USF Health PCIS Use and Security Agreement.
    a. Supervisors need to complete the PCIS Security Access Request form for the new employee(s). The employee must read and sign USF Health PCIS Use and Security Agreement.
    b. If a new employee will be attending new hire Orientation, USF Health Use and PCIS Security Agreement and the HSC account will be obtained at that time.

3. Fax all completed forms back to the ID&T at (813) 396-9619 or scan and email to dfrederi@health.usf.edu, chuber@health.usf.edu; **and** lboothma@health.usf.edu .

Note: A reminder and confirmation will be sent to the class participant (if email contact information exists) and to the supervisor at least 24 hours in advance of the class.

4. Security access will be given to the new employee upon successful completion of training.

Cancellations- Please notify us at least 24 hours in advance (if possible) if you will not be able to attend training. At this time, the training will be rescheduled.

Training Facilities

NORTH CAMPUS

Faculty Office Building 13220 USF Laurel Drive Tampa, FL 33612	1st Floor Rooms: 1301, 1302, 1303

ST. PETERSBURG CAMPUS

140 7TH Avenue South St. Petersburg, FL 33701	BAY 225 DAV 253 FCT 120

PARKING

Please obey all parking rules and regulations. Visitor parking passes are available in most locations. Please refer to the following website for information regarding visitor parking: http://usfweb2.usf.edu/parking_services/visitors.asp

For a visitor parking lot map, please click on the following link: http://usfweb2.usf.edu/parking_services/parking_map_files/2007maps/parking_map.pdf

PCIS View Only

Course Description

This course provides training on performing duties using the Allscripts Electronic Health Record (EHR) and GE Flowcast systems. Participants will be instructed on navigating through the GE/Web Framework, searching for and personalizing daily schedules, retrieving patient demographic information and locating documents within the patient's electronic chart.

INTENDED AUDIENCE

Research Assistants

COURSE LENGTH

1 ½ hours (3:00pm – 4:30pm)

ROLES/RIGHTS ON PCIS ACCESS REQUEST FORM

Touchworks View/Print & Patient Services - View Only (write in Section: Other)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and log into PCIS.
- Navigate and identify the main components of the GE/Web Framework.
- Access Patient Services and view patient demographic information.
- View and personalize the Provider Schedule.
- Access and update the Patient Profile.
- Identify the components of the Clinical Desktop including ChartViewer.

Clinical Support Staff – Session I

Course Description

This course provides training on performing clinical duties using the Allscripts Electronic Health Record (EHR) and GE Flowcast systems. Participants will be instructed on navigating through the GE/Web Framework, searching for and personalizing daily schedules, retrieving patient demographic information and locating documents within the patient's electronic chart. The course will also focus on entering patient clinical information, such as problems, allergies, medication history, immunizations, vital signs and viewing results. Participants will also learn how to manage daily tasks and request patient charts.

INTENDED AUDIENCE

Clinical Support Staff – Full Time and Temporary Employees

COURSE LENGTH

4 Hours (8:30am – 12:30pm)

ROLES/RIGHTS ON PCIS ACCESS REQUEST FORM

Clinical Care Specialist 1=MA, 2=LPN, 3=RN or Nurses= Nurse Team lead

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and log into PCIS.
- Navigate and identify the main components of the GE/Web Framework.
- Access Patient Services and view patient demographic information.
- Verify and/or change the Site.
- View and personalize the Provider Schedule.
- Access and update the Patient Profile.
- Identify the components of the Clinical Desktop including ChartViewer.
- Enter /update patient clinical data utilizing the Add Clinical Item (ACI) i.e. vitals, medications, allergies, etc.
- Place orders for labs and images.
- Create and manage structured notes, unstructured notes and forms using Text and Medcin Templates, ROS and Dictation markers.
- View radiology and laboratory results.
- Manage daily tasks.
- Request patient charts.

Clinical Support Staff – Session II

Course Description

This course is a follow up to Clinical Support Session I. The class will start with an assessment of skills learned in Session I. This assessment will be used to strengthen specific competencies and answer any questions. New information will be introduced on how to process incoming telephone calls, utilizing Tasking and scheduling basic follow up appointments.

INTENDED AUDIENCE

Clinical Support Staff

PRE-REQUISITES

Clinical Support Staff – Session 1

COURSE LENGTH

2 Hours (1:00pm – 3:00pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Process incoming telephone calls.
- View and work the Task List.
- Copy a Task to a clinical note.
- Schedule follow up patient appointments.

HEROES - Health Electronic Records Online Enhanced Support

Course Description

This course provides training for individuals who are identified by their Supervisor/Manager as having an advanced understanding of the PCIS System. The HEROES Workshop takes individuals to the next level of the PCIS program and teaching a more in-depth understanding of the program. This workshop also helps them develop troubleshooting skills and leadership qualities. Participants will participate in classroom exercises that will require classroom participation.

INTENDED AUDIENCE

Clinical Staff

PRE-REQUISITES

Clinical Support Staff – Session I & II
(F.T. with at least 6 months of employment and excels in the PCIS System)

COURSE LENGTH

1 Day (8:30am – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Navigate Dictation Toolbar.
- Activate/Deactivate Dictation Markers.
- Change site to current location.
- Order recurring medications.
- Remove an entry from a note.
- Open a Note and link to an Appointment.
- Unlock a locked Note.
- Add items to My Favorites.
- View images side-by-side via Web-PACS.
- Remove a problem from the Patient's Records.
- Verify Results & Patient Worklist.
- Enter Medication Hx.
- Add a problem from the patient's records.
- Order a medication.
- Renew an Rx with and without changes.
- Annotate an injection.
- Complete an order.
- Reprint Rx/Resend Rx and Reprint Requisition.
- Order Durable Medical Equipment (DME).

Provider Training

Course Description:

This course provides information on how to perform clinical inquiries, clinical updates and patient support using the V11 Allscripts Electronic Health Record (EHR) system. Providers will be instructed on how to navigate through the Allscripts system, search for and personalize their daily schedules, retrieve patient demographic information and locate documents within the patient's electronic chart. The course will also focus on entering patient information, ordering medications, adding problems and viewing results.

INTENDED AUDIENCE

Physicians
Residents or Fellows
Nurse Practitioners and Physician Assistants

ROLES/RIGHTS ON PCIS ACCESS REQUEST FORM

ARNP, Fellow, Physician, Physician Assistant, or Resident

COURSE LENGTH

2 Hours

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and log into PCIS.
- Navigate and identify the main components of the Web Framework.
- Verify and/or change the Site.
- View and personalize the Provider Schedule.
- Access and view and/or update the Patient Profile.
- Identify the components of the Clinical Desktop including ChartViewer.
- Update and/or review patient clinical data utilizing the Add Clinical Item (ACI) i.e. problems, allergies, medication, immunizations, etc.
- View radiology and laboratory results.
- Open or create and manage structured notes, unstructured notes and forms using Text and Medcin Templates and ROS.
- Add a dictation marker.
- Place new orders i.e. medications, labs, etc.
- Manage daily Tasks.

Allscripts A'la Carte Class

Allscripts is the USF Health Electronic Health Record (EHR). The classes listed below were created to give a more in depth look at specific features of the EHR.

INTENDED AUDIENCE

Physicians
Residents or Fellows
Nurse Practitioners and Physician Assistants

PREREQUISITES

PCIS Provider Training

COURSE LENGTH

90 minutes

Computerized Physician Order Entry (CPOE)

Computerized physician order entry (CPOE) is the process of electronically placing patient orders. These orders are communicated via computer network to the clinical staff, pharmacy, laboratory or radiology department.

OBJECTIVES

- Add new problems.
- Create Problem-based Orders.
- Create new Orders for:
    - Labs/Procedures
    - Imaging
    - Follow-up & Referrals

A/R Follow Up

Course Description:

The Accounts Receivable (A/R) Follow Up training course is designed to provide the Revenue Cycle staff with the necessary information to work patient and insurance outstanding balances through the Paperless Collection System (PCS) in the web-based version of the GE Healthcare / IDX Flowcast system. This training will also provide users with the necessary information to access and navigate throughout the system, as well as view patient and other pertinent system information.

This course is mandatory for all current and new A/R Follow Up staff requiring access to the GE Healthcare / IDX Flowcast system.

INTENDED AUDIENCE

RCO Patient Service Representatives
RCO Insurance Response Unit

ROLES/RIGHTS ON PCIS ACCESS REQUEST FORM

Insurance Response Unit or Patient Services/Collections

COURSE LENGTH

1 day (8:30am – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- Add, edit and view patient registration/ demographic and insurance/FSC information.
- Access and work patient invoices through the Paperless Collection System (PCS).
- Understand and utilize collector status codes.
- Recover PCS workfiles and sessions.
- Add, edit and view case information.
- View information in the Payor Contract Module (PCM) and Pricing Module.
- Access and interpret Invoice Inquiry detail.
- Access and edit insurance authorization information.
- Verify and run eligibility through eCommerce.

Call Process/Tasking

Course Description:

The Call Process/tasking training course will provide call center staff with the necessary skills to process patient messages to clinical support staff in the web-based version of the GE Healthcare / IDX Flowcast system.

INTENDED AUDIENCE

Call Processors

ROLES/RIGHTS ON PCIS ACCESS REQUEST FORM

Scheduler/Call Center

COURSE LENGTH

2 hours

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Set up Call Processing user preferences.
- Complete the Call Process Form.
- Task the call to a nurse team or provider.
- Save, retrieve and complete unfinished calls.
- Add Task views and change between task views.
- View and edit a task item.
- Process a Task Request.
- Reassign a Task.

CODA / COGNOS - Browse and Reports

Course Description:

The browse and reports training course will provide advanced users with information to view transactions in the general ledger using the web-based version of the Coda e-finance system and to run various reports in the Cognos system. This training will also provide advanced users with the necessary information to request new browsers and/or reports if needed.

This course is available to advanced users who have access to Coda e-Finance and Cognos systems.

INTENDED AUDIENCE

Current advanced users who reconcile general ledger accounts or distribute financial reports for their department

PRE-REQUISITES

Basic computer skills
Microsoft Windows navigation

COURSE LENGTH

3 hours (scheduled times vary)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Understand available items on the Menu on Codaweb.
- Review account structure of the elements for use in browsing.
- Understand use of selectors and presenters in browsing.
- Understand prompts used for browsing.
- Understand results from browsers.
- Export data, sort, and view browse results.
- Access and navigate throughout Cognos using the web version.
- Review monthly reports available to Run.
- Understand prompts used for reports.
- Read report results.
- View or save reports in other formats such as excel.
- Review other reports available for reconciliation purposes.
- Request new browsers and/or reports.

CODA e-Procurement - Beginning

Course Description:

The Beginning e-Procurement training course will provide users with the necessary information to process and manage purchase orders in the web-based version of the Coda e-Procurement system. This training will also provide users with the necessary information to access and navigate throughout the system, as well as view, modify, and print purchase orders.

This course is mandatory for all new users requiring access to the Coda e-Procurement system.

INTENDED AUDIENCE

New Coda users who will process purchase orders for their department

PRE-REQUISITES

Basic computer skills
Microsoft Windows navigation

COURSE LENGTH

Available Online only (Please email acctsys@health.usf.edu to register)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the e-Procurement features and view purchase order information.
- Understand and print items available on the Menu.
- Create, edit, copy and view purchase orders.
- Understand the components of My Home and Workflow.
- Print, save, receive, and remove receipts for purchase orders.
- Forms needed to request new or update vendor information.
- Understand the different purchase order types.
- Understand the account structure in Coda.
- Understand how to view receipts and matching status.
- Understand where to go for assistance.

CODA e-Procurement-Advanced

Course Description:

The Advanced e-Procurement training course will provide current users with advanced information to manage purchase orders being processed in the web-based version of the Coda e-Procurement system. This training will also provide participants with the necessary information to manage purchase orders using Team Home and My Home feature in Coda.

This course is available to current users who have access to the Coda e-Procurement system.

INTENDED AUDIENCE

Current users who manage purchase orders for their department

PRE-REQUISITES

Basic computer skills
Microsoft Windows navigation
Must have completed the Beginning e-Procurement training course or have skills and knowledge necessary for navigating the e-Procurement system.

COURSE LENGTH

2 hours (scheduled times vary)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Review the e-Procurement features and viewing purchase order information.
- Understand available items on the Menu on Codaweb.
- Understand the components of Team Home, My Home and workflow.
- Manage purchase orders using Team Home and/or My Home features.
- Submit purchase orders to workflow for approval.
- Verify status of purchase orders submitted to a workflow.
- Understand workflow design – including DEANSOFFICE & UMSAEXEC workflows.
- Understand differences between capability to approve and pass-thru review.
- Approve, deny, and cancel purchase orders via My Home.
- Approve, deny, and request modifications to purchase orders via workflow.
- Review different purchase order types.
- Review account structure of elements and using account code builder.

CODA Workflow Training

Course Description:

The workflow training course will provide authorizing users with information to view purchase orders via a workflow message received in an email. This training will also provide authorizing users with the necessary information to approve, deny, or request modification of purchase orders processed through the Coda e-Procurement system.

This course is available to authorizing users who have access to Coda Workflow, and Coda e-Procurement systems.

INTENDED AUDIENCE

Authorizing users who approve purchases for their department

PRE-REQUISITES

Basic computer skills
Microsoft Windows navigation
Microsoft Outlook navigation
Internet Explorer navigation

COURSE LENGTH

Available online only (Please email acctsys@health.usf.edu to register)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Understand Java requirements for workflow users.
- Understand Coda workflow messages received via email.
- Open attachments.
- Understand your Coda password.
- View details of purchase orders.
- Approve, deny, or request modification of purchase orders.
- Understand P'Thru approval process.
- Submit purchase orders to workflow.
- Understand workflow submission results.
- Understand workflow action messages.
- Understand proper authorizations required for purchase orders.
- Understand account structure of the elements used for purchase orders.
- Understand which screen prints are required by accounts payable.
- Understand department/division structure.

CREST (Customizable Resident Tracking)

Course Description:

The CREST Resident Tracking program is an automated, centralized resident/attending physician evaluation process for the Residency programs in the College of Medicine. CREST will allow the different Residency Programs to create a 360 degree evaluation process, allowing Residents and Attendings to quickly evaluate each other after each rotation.

INTENDED AUDIENCE

Resident Coordinators

COURSE LENGTH

2 Hours (times vary)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Add/Edit Programs, PGY Levels, Locations, and Rotations.
- Edit Evaluations.
- Assign Evaluations to Attendings.
- Schedule Rotations or Edit an existing Rotation.
- Link Attendings and Residents to a specific rotation.

Department Administrator

Course Description:

The Department Administrator course is designed to provide Administrative staff with the necessary information to access and navigate throughout PCIS, view patient information and print system reports.

This course is mandatory for all current and new Administrative staff requiring access to PCIS.

INTENDED AUDIENCE

Department Administrators and Supervisors
Provider Administrative Assistants/Secretaries
USFPG Directors
USFPG non-clinical Departments (i.e. Finance and Accounting, Managed Care)

ROLES/RIGHTS ON PCIS SECURITY ACCESS REQUEST FORM

Dept Administrators

COURSE LENGTH

3.5 Hours (8:30am – 12noon or 1pm – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and log into PCIS.
- Navigate and identify the main components of the Web Framework.
- Access Patient Services and view patient demographic information.
- Move through fields on a screen using the proper navigation techniques.
- Access and view:
    - Invoice Inquiry detail.
    - Dictionary information.
- Access and print provider schedules, patient ledgers and financial reports.

Financial Specialists

Course Description:

The Financial Specialists course is designed to provide the Revenue Cycle Financial Specialists with the necessary information to view and edit patient registration and insurance information in the web-based version of the GE Healthcare / IDX Flowcast system. This training will also provide users with the necessary information to access and navigate throughout the system, as well as view patient information and other pertinent system information.

This course is mandatory for all current and new Financial Specialists staff requiring access to the GE Healthcare / IDX Flowcast system.

INTENDED AUDIENCE

RCO Financial Specialists

ROLES/RIGHTS ON PCIS SECURITY ACCESS REQUEST FORM

Financial Specialist

COURSE LENGTH

8 Hours (8:30am – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize the main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- Add, edit and view patient registration demographic and insurance information.
- Access the Appointment Manager screen and add authorization information.
- Add, edit and view case information.
- Access and view Invoice Inquiry detail.
- Understand and utilize Financial Status Classifications (FSCs).
- Perform batch maintenance activities.
- Understand and utilize collector status codes.
- Access various websites for referral, authorization and eligibility information.
- Add General Comments to patient accounts.
- Verify and run eligibility through eCommerce.

Front Desk

Course Description:

The Front Desk course is designed to provide Revenue Cycle Front Desk staff with the necessary information to update patient registration information, arrive patient appointments, and perform patient Check Out activities in the web-based version of the GE Healthcare / IDX Flowcast system. This training will also provide users with the necessary information to access and navigate throughout the system, as well as view patient and other pertinent system information.

This course is mandatory for all current and new Front Desk staff requiring access to the GE Healthcare / IDX Flowcast system.

INTENDED AUDIENCE

RCO Front Desk staff

ROLES/RIGHTS ON PICS SECURITY ACCESS REQUEST FORM

Front desk Staff

COURSE LENGTH

2 Days; 1 day class room instruction; 1 day in "live" environment

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- View and edit patient registration/demographic and insurance/FSC information.
- Add, edit and view case information.
- Access and utilize the Appointment Manager screen.
- View patient appointments through the Appointment Manager screen.
- Arrive patient appointments upon patient check-in.
- Schedule follow-up patient appointments.
- Post a co-payment.
- Enter charges through TES Charge Entry upon patient check-out.
- Balance cash drawer, reconcile batch and perform other batch maintenance activities.

Information Services Help Desk Training

Course Description:

The purpose of this course is to provide information about performing tasks in relation to USF Health software. The trainee will learn what software USF Health utilizes, and how to maintain and control it. The trainee will walk away with knowledge that will help prepare them for the majority of calls regarding USF Health software.

INTENDED AUDIENCE

IS Help Desk New Hires

COURSE LENGTH

New Employees: 4 Hours (8:30am – 12:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Reset and unlock accounts in TWScan.
- Control session in Citrix using Management Console.
- Understand the usage of printers in the clinical setting.
- Unlock notes and accounts in PCIS.
- Correct the printer queue errors and session limits.

Information Technology Overview

Course Description:

The purpose of this course is to familiarize all newly hired employees of USF Health with a basic overview of the information technology (IT) infrastructure and software utilized. Participants will be instructed on how to log in to the correct network, lock and log off the workstation, add printers, save documents, as well as use Microsoft Outlook. This course will also cover simple trouble-shooting techniques for more common IT problems faced by employees.

INTENDED AUDIENCE

New Employees

COURSE LENGTH

1.5 hours

OBJECTIVES

Upon completion of this class, participants will be able to:

- Contact the Information Systems Help Desk.
- Log onto the network and navigate through Windows.
- Add or change your default printer.
- Recognize and use the network and personal drives.
- Navigate Microsoft Outlook: email, calendar, task and contact.
- Access work email via the internet.
- Perform basic trouble-shooting techniques.

Medical Records

Course Description:

The Medical Records course provides Medical Records staff with the necessary information to access and utilize the Chart Tracking module in PCIS. This course also includes an overview of Scheduling, Follow- up appointments, updating patient information and Clinical Desktop.

This course is mandatory for all Medical Records staff requiring access PCIS.

INTENDED AUDIENCE

Medical Records staff

ROLES/RIGHTS ON PICS SECURITY ACCESS REQUEST FORM

Medical Records Staff

COURSE LENGTH

4 Hours (8:30am – 12:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- Access the Chart Tracking module through the Web Framework.
- View chart location and pending requests.
- Request a chart.
- Delete a chart request.
- Perform chart batching activities.
- Transfer a chart with or without a pending request.
- Identify components of the Task List screen.
- View and edit tasks.
- Process and delegate a task.
- Overview and concept of scheduling patients and follow up appointment.
- View pertinent information located on the clinical Desk Top.
- Update patient’s demographics.

Microsoft Office Suite Classes

COURSE LENGTH

90 minutes

Microsoft Outlook 2007

Outlook is a personal information Manager from Microsoft mainly used as an email application. This application also includes a Calendar, Task Manager, Contact Manager, note taking and a journal. Learn how to reply, forward, open, save and create messages. Through Calendar learn how to schedule appointments, add holidays and set Calendar options. In addition, learn to create, edit and delete a contact in Contact Manager.

Microsoft Excel 2007

Excel is Microsoft's spreadsheet-application. Topics include overview of excel, setting up a workbook, changing document appearance, formulas and printing documents.

Migrating from 2003 to 2007 Class

Microsoft PowerPoint 2007

Microsoft PowerPoint is used to create presentations through slides. Topics include starting a new presentation, working with slide text, layout, order and format, adding tables, charts and diagrams and enhancing slides with graphics.

Migrating from 2003 to 2007 Class

Microsoft Word 2007

Word is Microsoft's word processing software that is used to create and share Documents. Topics include creating, editing and formatting documents, working with smart art and tables to present information and utilizing templates, clipart, shapes and word art to create professional documents.

Migrating from 2003 to 2007 Class

A'LA CARTE CLASSES

- Design Flyers
- Customize Forms

These are not Microsoft Office Certified Training courses

Payment Posting

Course Description:

The Payment Posting training course is designed to provide the Revenue Cycle Payment Posting staff with the necessary information to enter and post patient payments, insurance payments, post refunds and balance batches in the web-based version of the GE Healthcare / IDX Flowcast system. This training will also provide users with the necessary information to access and navigate throughout the system, as well as view patient and other pertinent system information.

This course is mandatory for all current and new Payment Posting staff requiring access to the GE Healthcare / IDX Flowcast system.

INTENDED AUDIENCE

RCO Payment Posting staff

ROLES/RIGHTS ON PICS SECURITY ACCESS REQUEST FORM

Payment Posters

COURSE LENGTH

8 Hours (8:30am – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- View and edit patient registration information.
- Create payment posting batches.
- Post self-pay / patient and insurance payments.
- Correct payments posted in error.
- Post a refund.
- Balance and reconcile payment posting batches and other batch maintenance activities.
- View/add financial comments.
- Access and view Invoice Inquiry detail.
- Print patient ledgers, statements and claims.

PCIS Overview

Course Description:

The PCIS Overview course is designed to provide users within USF Health a general understanding of the PCIS system from registration of new patients through the entire patient experience. For a great behind the scene look at the PCIS system, this is the course for you.

INTENDED AUDIENCE

Anyone who would like a better understanding of the PCIS system used at USF Health

COURSE LENGTH

1.5 hours

OBJECTIVES

Upon completion of this class, participants will have the answers to:

- What is PCIS?
- What are the processes involved in PCIS?
- Why does USF Health use PCIS?

Registration

Course Description:

This course provides the Pre-Arrival Registration staff with the necessary skills to access and navigate throughout the Web Framework, enter and edit patient registration and insurance information, and view patient appointments in PCIS.

This course is mandatory for all current and new pre-arrival registration staff requiring access PCIS.

INTENDED AUDIENCE

Pre-Arrival Registration Staff
Clinical Department Registration Staff

ROLES/RIGHTS ON PCIS SECURITY ACCESS REQUEST FORM

Registration Staff

COURSE LENGTH

8 Hours (8:30am – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- Register new patients.
- View and edit patient registration information.
- Utilize the duplicate patient checker feature.
- Enter primary and secondary insurance information utilizing the appropriate Financial Status Classifications.
- Activate and deactivate patients.
- Update and edit the appointment data form.

Schedulers

Course Description:

This course provides Scheduling staff with the necessary skills to register and update patient demographics and insurance information. This course will also cover scheduling appointments including cancelling and rescheduling appointments, overbooking appointments, adding time to a provider schedule, etc.

This course is mandatory for all current and new Scheduling staff requiring access to PCIS.

INTENDED AUDIENCE

Telephone Schedulers

ROLES/RIGHTS ON PCIS SECURITY ACCESS REQUEST FORM

Scheduler/ Call Center

COURSE LENGTH

2 days (8:30am – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- Enter, view and edit patient demographic information.
- Enter insurance information utilizing the correct Financial Status Classification.
- Create, edit and view patient appointments.
- Cancel and reschedule existing patient appointments.
- Understand the components of a provider’s schedule.
- Link patient appointments.
- Access and update the bump list and wait list.
- Identify components of the Call Process Screens.
- Complete and task the Call Process Form to a nurse team or provider.
- Process Task Request and reassign to appropriate team or provider.

SharePoint - Contributor

Course Description

SharePoint is an intranet that is developed specifically for each department in order to manage the volume of information that can be shared within their department or visitors visiting their site. Only those who are part of the HSC network can access SharePoint.

INTENDED AUDIENCE

Anyone with Contributor access to a USF health SharePoint Site

COURSE LENGTH

1.5 hours

OBJECTIVES

Upon completion of this class, participants will be able to:

- Navigate SharePoint.
- Add, Edit, and delete items from lists.
- Add, edit, and delete items from Document libraries.
- Utilize the Advanced search.

SharePoint – Full Control

Course Description

SharePoint is an intranet that is developed specifically for each department in order to manage the volume of information that can be shared within their department or visitors accessing their site. Only those who are part of the HSC network can access SharePoint.

INTENDED AUDIENCE

Anyone with Full Control access to a USF health SharePoint Site

COURSE LENGTH

2 hours

OBJECTIVES

Upon completion of this class, participants will be able to:

- Navigate SharePoint.
- Create new libraries, lists and websites.
- Add, update, and remove web parts.
- Add, Edit, and delete items from lists.
- Add, edit, and delete items from Document libraries.
- Utilize the Advanced search.
- Manage Site Settings.
- Manage Site Permissions.

TES Charge Entry & TES Workfiles

Course Description:

The Transaction Editing System (TES) Charge Entry & TES Workfile training course is designed to provide the Revenue Cycle Coding and Department Liaison Services (DLS) with the necessary information to enter charges, balance charge batches, access TES Workfiles and process TES edits in the web-based version of the GE Healthcare / IDX Flowcast system. This training will also provide users with the necessary information to access and navigate throughout the system, as well as view patient and other pertinent system information.

This course is mandatory for all current and new Revenue Cycle Coding staff requiring access to the GE Healthcare / IDX Flowcast system.

INTENDED AUDIENCE

Revenue Cycle Coding staff
Revenue Cycle Department Liaison Services (DLS) staff
Department of Interdisciplinary Oncology (DIO) staff

ROLES/RIGHTS ON PCIS SECURITY ACCESS REQUEST FORM

Coders, TES Workfiles

COURSE LENGTH

8 Hours (8:30am – 4:30pm)

OBJECTIVES

Upon completion of this class, participants will be able to:

- Access and navigate throughout the Web Framework version.
- Identify and utilize main components of the Web Framework screens.
- Access the Patient Services screen and view patient information.
- View and edit patient registration information.
- Create, balance and reconcile TES charge batches.
- Enter patient charges into the appropriate fields and screens.
- Access TES workfiles through the new Enterprise Task Manager (ETM).
- Display TES workfile edit conditions.
- Edit TES workfile transactions.
- Access and view Invoice Inquiry detail.

Lyris List

Course Description

Lyris is a mailing list application sometimes used in USF Health. Lyris is used for mailing lists, in place of Outlook, when there are people maintained on the list with **email addresses other than** USF Health addresses. Outlook (Groups) can only have USF Health email addresses as part of the group, so when there is a list with mixed email addresses, an application like Lyris is utilized.

INTENDED AUDIENCE

Any USF Health Faculty or Staff

COURSE LENGTH

Approximately 1 Hour

ROLES/RIGHTS

A Lyris List must initially be established by Networking personnel in USF Health IS before user can begin to populate it. The department spokesperson should request establishment of a Lyris List through a service ticket. If a prospective user needs training on the use of Lyris, request that on a Training Request.

OBJECTIVES

Upon completion of this class, participants will be able to:

- Add, edit, and subtract members from the list.
- Build a message inside of Lyris for distribution to the list.
- Optionally set a future date for the message to be sent which will automatically trigger a mailing on that date.
- Track mailings.
- Review automatic rejections due to the email address no longer being valid or of some other technical reason.

Checkbox Survey

Course Description

Checkbox is an application that provides a structured method to build and implement surveys. USF Health has a bulk license for this product, meaning that any member of USF Health may legally use this tool in the course of doing business for USF Health. The training, usually conducted one-on-one, will prepare the user to build, maintain, and report the findings of a survey created in Checkbox.

INTENDED AUDIENCE

USF Health Faculty, Staff, or Students who need to use a survey in the course of their USF Health businesss.

COURSE LENGTH

Up to 2 Hours depending on user's prior experience in building surveys.

ROLES/RIGHTS

All users will need a Checkbox account, created by the staff of ID&T upon request, in order to access Checkbox.

OBJECTIVES

Upon completion of this class, participants will be able to:

- Build a survey using Radio Buttons, Drop Down List, Checkboxes, a Matrix, single or multiple line text, and CAPTCHA.
- Edit an existing survey.
- Report on the results of a survey through Checkbox, or export the data to Excel or SPSS.
- Invite respondents to take a survey through Checkbox, email, or as a link from a web page.
- View and personalize the Provider Schedule.
- Scoring a survey (if the student intends to use Checkbox for testing purposes).
- Uploading images into a survey.