Netsmart

San Bernardino BHMIS Phase I End User Training Agenda

Configuration	
Date:	TBD
Course Instructor:	TBD
Duration:	3 Days
Super User Attending:	TBD
Location:	TBD
Roles required to complete:	INSERT ROLES HERE
Objective	
Objective:	

DAY 1 - PM
DATE
Time: 8:00AM – 4:30PM

EST. START/END TIME	TOPIC	NOTES

8:00 – 8:45	**Avatar Basics**
	     Logging In and Out
	     Navigation of Home View
	     My Forms
	     Clients Widget
	     Change Current Password
	     Navigation of Chart View	

8:45 – 10:00	**User Maintenance**
	     User Role Definition
	     User Definition
	     Change User ID
	     Change User Role ID
	     User File Import
	     User Role File Export
	     User Failed Authentication Question
	     Display User
	     Display User Role
	     Change User ID File Import
	     User Merge
	     User Merge File Import
	     Quick user Update	

10:00 – 10:15	BREAK	

10:15 – 11:30	**System Support / System Security**
	     System Security Defaults
	     Force Terminal Logoff
	     Send Message to All Terminals
	     Send Message to Specific User	

11:30 – 12:30	LUNCH	
12:30 – 1:45	**Auditing**	

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EST. START/END TIME	TOPIC	NOTES
	Current System Status Failed Logon Report Report of System Usage Purge Report of System Usage History Non Caseload Access Report Purge Entity Access History Event Log Definition Event Log Report	
1:45 – 2:00	**BREAK**	

2:00 – 4:00	**Table and Dictionary Maintenance (Database Management)**
	  Dictionary and Table Maintenance
	  Dictionary Update
	  Diagnosis Table Maintenance
	  Zip Code Table Maintenance
	  State Table Maintenance
	  Dictionary Import/Export Registry Management
	Registry Settings	

4:00 – 4:30	**End of Day Wrap Up / Questions**	

DAY 2 - PM DATE Time: 8:00AM – 4:30PM		
EST. START/END TIME	**TOPIC**	**NOTES**
8:00 – 8:15	**Review of Day 1 / Questions**	

8:15 – 9:45	**Practitioner Management**
	  Practitioner Registration
	    Practitioner Enrollment
	      Practitioner Termination
	        Practitioner Termination > Scheduling Calendar
	        Customization
	  Practitioner Information
	    Practitioner Information (Confidential)
	    License Information
	    Practitioner Inquiry
	  Practitioner Maintenance
	    Practitioner Only Service Delete
	    Transfer Practitioner Caseload
	    Refresh Caseloads	

9:45 – 10:00	**BREAK**	

10:00 – 11:30	**Client Management > System Maintenance**
	  Delete Last Movement
	  Delete Service
	  Delete Service (Open Service Only)	

	Client Delete Caller Purge Change MR# Back Dated Admission/Discharge Client Merge Delete Claim Open Closed Charges Change Program/Admission Date File Import	
11:30 – 12:30	**LUNCH**	
12:30 – 2:00	**Scheduling > Site Management** Site Registration Edit Site Registration Date Site Schedule Allowable Users Site Overbooking Allowable Users Site Termination Delete Site Termination Site Inquiry Staff Member Hours and Exceptions	
2:00 – 2:15	**BREAK**	
2:15 – 3:45	**Group Management** Group Registration Edit Group Registration Date Group Termination Delete Group Termination Group Member Assignment Group Member Listing	
3:45 – 4:30	**End of Day Wrap Up / Questions**	
DAY 3 - MSO **DATE** **Time: 8:00AM – 4:30PM**		
EST. START/END TIME	**TOPIC**	**NOTES**
8:00 – 9:00	**Codes and Groupings** CPT Code Definition Revenue Code Definition (Manual and import) Procedure Code Group Definition Set Associated Codes Associated Code Upload	
9:00 – 9:30	**Funding Sources and Benefit Plans** Funding Source Registration Funding Source Termination Plan Definition Benefit Plan Definition/Coverage Levels & Plan Liability	

	Definition Funding Source /Guarantor Mapping	
9:30 – 9:45	**BREAK**	
9:45 – 11:30	**Provider Management** Applying Contracting Provider Contracting Provider Registration Performing Providers (For Contract Providers Only) Provider Fee Definition	
11:30 – 12:30	**LUNCH**	
12:30 – 2:00	**Authorizations** Review of forms Authorization Status and Authorization Reason Codes (Dictionary) File Import (Authorizations Import) Service Authorization >Copy functionality Authorization Grouping Definition Service Authorization>Inhibit Adjudication for other services claim during [this] authorization's period Inactive Authorization Configuration Budget Tracking Account Setup Care Manager Setup	
2:00 – 2:15	**BREAK**	

2:15 – 4:00	**Claims Processing**
	Source of Claims and Batch Naming Conventions
	Claims Adjudication Rules Definition
	Approve / Pend / Deny Rule Definition
	Miscellaneous (Hard-Coded)
	Custom (outpatient and inpatient)
	Require Diagnosis Entry
	Require Location
	Require Duration/Enable Service Times
	Claim Processing Blackout
	MSO To Parent System Integration Mapping
	    Alignment between Service/Mapping/PM Admission
	
	Retro Claim Adjudication
	Transactions that Failed MSO to PM Push
	    "Funding Source Not Eligible on Date of Service for Member
	    error message
	    Failed Transactions - MSO to PM Service Failed table	

4:00 – 4:30	**MSO 837/835 - Contract Providers Only** Set System Defaults (MSO) Applying Contracting Provider HIPAA 5010 Setting Contracting Provider Registration 837 Default Settings Contracting Provider 835 Defaults Contracting Provider/Funding Source 835 Defaults	

Specific Training Notes for this Course