Certified Consultant Training Curriculum

This guide will show you everything you need to know to successfully implement Practice Fusion's EHR for your clients.

Topic 1: Get to know Practice Fusion!

Get to know Practice Fusion and why we're different from other EHRs on the market.

Take a tour video *(4:48) http://www.youtube.com/watch?v=pVYdPcqlSf8*

Topic 2: Learn to implement the EHR

Focus on one feature at a time and at the end, attend the **Live Training session** for a complete review of the EHR.

Equipment Readiness *(3:36) http://www.youtube.com/watch?v=p__Qqvn1g9s*

- Intel® Celeron® 2GHz or faster processor, 1024x768 minimum screen resolution, 1GB of RAM, and Adobe Flash
  For more detailed requirements go to our System Requirements Page

Adding Users *(1:12) http://www.youtube.com/watch?v=PNRPtenIk6I*

- Enter the **Admin section** at the top of the EHR
- Click on the **Users tab** in the upper left corner
- In the upper right corner, click on the **Add New User(s) button**
- Enter your client's information, then select an Edit Level based on their role in the practice
- Click the **Add new Users button**

Adding Patients *(1:24) http://www.youtube.com/watch?v=ZAiT60VjLDY*

Note: Consultants should import patient lists rather than adding individual patients

- Extract the Excel or CSV file
- Enter the **Charts section** at the top of the EHR
- Click on the **Patients tab**
- Click on the **Import Patients button** in the top right corner
- Follow the instructions on the screen

Email support@practicefusion.com to schedule a time to import your client's patient list. You will need to be in front of their computer with access for at least an hour.

You can also import the patients yourself if you are able to extract an Excel or CSV file from you client's billing or previous EHR software.

Activate e-Prescribing *(1:00) http://www.youtube.com/watch?v=v-sWAx16OcE*

- Enter the **e-Scripts section** at the top of the EHR
- Click on the **Sign up to e-Prescribe button** in the upper right corner
- Click on the **Download Fax Form button** in the bottom right corner
- Print out the form and fill it out for your client
- Scan and email the form to support@practicefusion.com

Activate Labs *(1:44) http://www.youtube.com/watch?v=UN1u4BAf6dY*

- Enter the **Labs section** at the top of the EHR
- Click on the **Sign up for Lab integration** button in the upper right corner
- Select the lab partners your client uses and enter their *Account #* and *Lab Rep's information*
- Click the **Sign up button** in the bottom right corner

Customize Templates *(1:45) http://www.youtube.com/watch?v=LqTW3yAzqiA*

- Enter the **Admin section** at the top of the EHR
- Click on the **Customize your EHR tab**
- Select templates from the box on the left and click the **Claim Selected Templates button** in the bottom right corner to add them
- To edit the template, click on the template name in the box on the right after claiming it and click the **pencil icon** next to a line of text or scroll to the bottom to add a new line of text
- Click on the **X button** at the top right corner of the box on the right when you are done customizing that template
- Click the **+ button** in the upper right corner of the box on the right to create a new template

Set up Billing *(1:01) http://www.youtube.com/watch?v=dtbQlSL-jXs*

- Superbills are created from a **Chart Note** in Practice Fusion
- Either provide your own billing service to your client, help them continue with their existing biller or transition them to our integrated billing partner, www.kareo.com

Upload Documents *(1:03) http://www.youtube.com/watch?v=wvSOKR4QBcI*

- Scan the document and save it to the computer's desktop
- Enter the **Documents section** at the top of the EHR
- Click on the **Upload New Document button** in the upper right corner
- Select the document from the computer's desktop
- Follow the instructions on the screen and click the **Save button** in the bottom right corner

Add Referral Network *(1:01) http://www.youtube.com/watch?v=l_sVktlcPsI*

- Enter the **Charts section** at the top of the EHR
- Click on the **Patients tab** and search for the test patient *Jessica TestChild*
- Select *Jessica TestChild* and click on the **Pull Chart button** in the upper right corner
- Hover over the **Patient Actions menu** at the top
- Click on **Send referral / response letter**
- For the first recipient, fill out the information on the screen and click the **Add and Refer button** in the bottom right corner
- A referral letter will open, click the **Back button** in the bottom left corner
- Click on the **Add Multiple Recipients button** in the bottom right corner
- Fill out the information and click the **Add Referral Recipients button** in the bottom right corner

Create Forum Screen Name *(2:04) http://www.youtube.com/watch?v=EeaF2eO_Kfw*

- Click on the **EHR Assistant bar** on the right side of the EHR
- Enter the **Ask Us section** and click on **Forum**
- Create a screen name for your client and click the **Join the Forum button** below

Topic 3: The Next Steps...

Now that you've seen how to complete the various tasks in implementation, the **Live Training session** will complete your training. These trainings are held weekly and you should attend as many as you need to be confident out in the field.

Live Training: Every Wednesday at 10:00AM PST / 1:00PM EST

- Log in at www.practicefusion.com/pfmarketing and enter with your full name.