

# AltaPoint Practice Management - Introduction

(3 day course)



## Who should attend

Individuals attending this course are involved in one or more of the areas listed below:

- Determining setup and reporting requirements for the software system
- Performing software administrative functions
- Entering and maintaining practice information
- Entering and maintaining patient information
- Performing transaction entry and billing functions
- Managing electronic and paper claims
- Entering and allocating payments
- Generating patient statements
- Producing end-of-day production reports
- Maintaining HIPAA compliance standards
- Scheduling
- Creating standard financial and management reports

## Prerequisites

A working knowledge of the Windows operating system is required.

## What course provides

This instructor-led course explores the features and functions of AltaPoint Practice Management to help your office hit the ground running.

## What students learn

Upon completing this hands-on course, the student will have:

- Opened and examined the components of the screen
- Set up practice defaults and information
- Created and edited billing codes
- Applied security settings to various system components
- Performed utility functions such as backup and data repair
- Added, edited, and deleted address and insurance list data
- Added and edited patient demographic information
- Imported, modified, and saved images in the patient file
- Entered ICD-9 and CPT codes into the patient ledger
- Generated a HCFA claim
- Managed claims individually and in batches
- Processed and applied patient co-pays and batch payments
- Printed a patient statement
- Produced a day sheet, bank deposit slip, and transaction journal
- Used standard forms and features to assist in HIPAA compliance
- Scheduled patients and produced scheduling reports
- Created reminders, alerts, and tasks to increase office efficiency
- Generated financial and management reports

## What students receive

Each student receives a copy of our AltaPoint Training Solutions Student Manual for post-class reference and review.

## Course Outline – Day 1 –Setup & Configuration

### Getting Started

- Installing AltaPoint Practice Management
- Examining the Program Interface
- Navigating in the Program
- Getting Help
- Tips and Shortcuts for Increased Efficiency

### Setting Up the Practice Database

- Entering Practice Information
- Setting Practice Defaults
- Setting Up Providers
- Setting Up Employees

### Revealing the Power of Billing Codes

- Defining Billing Codes
- Creating Billing Codes
- Modifying Billing Codes
- Utilizing AltaPoint Codes on Disk
- Working with Fee Schedules
- Creating Compound Codes

### Securing Your Practice Information

- Discussing System Security Options
- Using the Security Access Form
- Setting Passwords
- Assigning Security Access

### Exploring System Utilities

- Backing Up Your Data
- Repairing the Database
- Resetting Balances
- Posting to QuickBooks
- Importing & Exporting Data

Course Outline – Day 2 – Front Office Functions	Course Outline – Day 3 – Back Office Functions
<p>Working with the Address File</p> <ul style="list-style-type: none"> <li>■ Working with the Address File</li> </ul> <p>Working with the Insurance List</p> <ul style="list-style-type: none"> <li>■ Using the Insurance Company List</li> <li>■ Maintaining Guarantor Information</li> </ul> <p>Managing Patient Information</p> <ul style="list-style-type: none"> <li>■ Adding &amp; Editing Patient Information</li> <li>■ Viewing Patient Information</li> <li>■ Working with the Ledger</li> <li>■ Creating Custom Fields</li> <li>■ Adding Notes</li> <li>■ Attaching Documents to the Patient File</li> <li>■ Working with Images</li> <li>■ Managing Referrals</li> </ul> <p>Scheduling in AltaPoint</p> <ul style="list-style-type: none"> <li>■ Setting up the Scheduler</li> <li>■ Creating Appointments</li> <li>■ Exploring Appointment Attributes</li> <li>■ Defining Views</li> <li>■ Scheduling Reports</li> </ul> <p>Using Reminders &amp; Tasks</p> <ul style="list-style-type: none"> <li>■ Working with Reminders &amp; Alerts</li> <li>■ Exploring Task Management</li> </ul> <p>Examining HIPAA Tools</p> <ul style="list-style-type: none"> <li>■ Data Encryption Options</li> <li>■ Restricting Access to Patient Information</li> <li>■ Supplying External Records &amp; Requests</li> <li>■ Using the Patient Access Log</li> <li>■ Examining HIPAA Forms</li> </ul>	<p>Exploring Patient Billing</p> <ul style="list-style-type: none"> <li>■ Patient Charges</li> <li>■ Generating a HCFA</li> <li>■ Processing Patient Co-Pays</li> </ul> <p>Managing Claims</p> <ul style="list-style-type: none"> <li>■ Examining the Claims Management Window</li> <li>■ Printing a Claims Batch</li> <li>■ Printing Claims Labels</li> </ul> <p>Processing Payments</p> <ul style="list-style-type: none"> <li>■ Applying Batch Payments</li> <li>■ Viewing Payment Detail</li> <li>■ Exploring Electronic Remittance Advice</li> </ul> <p>Exploring Patient Statements</p> <ul style="list-style-type: none"> <li>■ Setting Statement Options</li> <li>■ Printing Cycle Statements</li> <li>■ Printing Walkout Statements</li> <li>■ Creating Estimates</li> <li>■ Creating Payment Contracts</li> <li>■ Assigning Finance Charges</li> </ul> <p>Creating End-of-Day Reports</p> <ul style="list-style-type: none"> <li>■ Day Sheets</li> <li>■ Bank Deposit Slips</li> <li>■ Transaction Journals</li> </ul> <p>Working with Financial Reports</p> <ul style="list-style-type: none"> <li>■ Production Reports</li> <li>■ Inventory Reports</li> <li>■ Creating Lists &amp; Labels</li> <li>■ Utilizing Presentation Graphics</li> <li>■ Customizing Reports</li> </ul>

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