

PURPOSE

OpenVPMS training includes the following sessions:

Essentials Training 1

- **Getting Started - 5 Topics**
 - Modules & Workspaces - 2:09 min/sec
 - Buttons, Tabs & Keyboard Shortcuts - 2:25 min/sec
 - Hyperlinks - 1:53 min/sec
 - Summary Panel - 2:19 min/sec
 - More - 1:25 min/sec
- **Searching - 8 Topics**
 - General Searching - 3:20 min/sec
 - Searching by Customer - 1:43 min/sec
 - Searching by Patient Name - 2:29 min/sec
 - Searching by Contact - 1:44 min/sec
 - Combination Searches - 1:19 sec/min
 - Identity Search - 1:33 min/sec
 - Patient Workspace Searching - 2:34 min/sec
 - Product Searching - 2:06 min/sec
- **Customer Information - 6 Topics**
 - Adding a New Customer - 1:41 min/sec
 - Basic Customer Details - 2:14 min/sec
 - Customer Contact Details - 3:45 min/sec
 - Editing a Customer - 1.23 min/sec
 - Direct Customer Add - 1:56 min/sec
 - Discounts - 2:05 min/sec
- **Patient Information - 5 Topics**
 - Adding a Patient - 1:45 min/sec
 - Basic Patient Details - 2:14 min/sec
 - Patient Identities - 1:59 min/sec
 - Direct Patient Add - 2:17 min/sec
 - Discounts - 2:10 min/sec
- **Appointment Scheduling - 4 Topics**
 - Navigating The Schedule - 2:49 min/sec
 - Adding an Appointment - 3:00 min/sec
 - Moving & Copying Appointments - 1:31 min/sec

- Editing & Deleting Appointments - 1:33 min/sec
- **Consulting Workflow - 6 Topics**
 - Check-In a Patient - 3:20 min/sec
 - Consulting - 2:48 min/sec
 - Invoicing - 4:41 min/sec
 - Check-Out Charges - 1:46 min/sec
 - Check-Out Payment - 2:20 min/sec
 - Check-Out Follow Up - 1:54 min/sec

Essentials 1 Course - Total - 34 Training Topics/Videos
Total Time - 69.03 min/sec

Essentials Training 2

- **Task Management - 2 Topics**
 - Worklists - 3:06 min/sec
 - Adding, Completing and Deleting Tasks - 1:49 min/sec
- **Payments, Credits & Refunds - 5 Topics**
 - Account Payment - 1:35 min/sec
 - Deposit Payment - 1:12 min/sec
 - Credits & Returns - 2:48 min/sec
 - Refunds - 1:31 min/sec
 - Payment Reversals - 1:31 min/sec
- **Counter Sales - 2 Topics**
 - Over The Counter Sales - 1:08 min/sec
 - Customer Counter Sales - 1:39 min/sec
- **Estimations - 3 Topics**
 - Adding an Estimate - 2:46 min/sec
 - Invoicing an Estimate - 1:17 min/sec
 - Copying an Estimate - 2:26 min/sec
- **Reminders - 3 Topics**
 - General Reminders - 1:45 min/sec
 - Adding a Reminder - 4:04 min/sec
 - Editing a Reminder - 1:23 min/sec
- **Documents - 3 Topics**
 - Adding Forms - 4:48 min/sec
 - Adding Letters - 6:24 min/sec
 - Adding Attachments - 2:44 min/sec

Essentials 2 Course - Total - 18 Training Topics/Videos
Total Time - 40.41 min/sec

Essentials Training 3

- **Alerts - 3 Topics**
 - Customer Alerts - 3:30 min/sec
 - Patient Alerts - 2:41 min/sec
 - Mandatory Alerts - 1:56 min/sec

- **Prescriptions - 4 Topics**
 - Consulting Prescription - 2:19 min/sec
 - Manual Prescription - 2:42 min/sec
 - Dispense from a Prescription - 1:36 min/sec
 - Cancel a Prescription - 1:14 min/sec

- **Investigations - 2 Topics**
 - Add an Investigation - 3:14 min/sec
 - Reviewing Investigations - 2:06 min/sec

- **Communications - 5 Topics**
 - General - 1:49 min/sec
 - Adding Notes & Logs - 3:05 min/sec
 - Sending Emails - 3:42 min/sec
 - Email Templates - 1:31 min/sec
 - Sending SMS's - 2:36 min/sec

- **Till Balancing - 3 Topics**
 - General - 1:55 min/sec
 - Print Till Balance - 2:07 min/sec
 - Till Balancing & clear Tills - 2:42 min/sec

Essentials 3 Course - Total - 17 Training Topics/Videos
Total Time - 38.71 min/sec

Management Training

❑ Advanced Customer & Patients - 3 Topics

- ❑ Merging Customers - 2:26 min/sec
- ❑ Merging Patients - 3:36 min/sec
- ❑ Changing Patient Ownership - 2:16 min/sec

❑ Lookups - 3 Topics

- ❑ Adding/Editing a Standard Lookup - 3:24 min/sec
- ❑ Adding/Editing Linked Lookups - 3:14 min/sec
- ❑ Adding/Editing Macros - 7:15 min/sec

❑ Processing Reminders - 6 Topics

- ❑ Reminders Workspace - 5:21 min/sec
- ❑ Sending Reminders - 2:54 min/sec
- ❑ Reminder Errors - 4:26 min/sec
- ❑ Re-Sending Reminders - 2:58 min/sec
- ❑ Previewing Reminders - 1:37 min/sec
- ❑ Completing Reminders - 2:14 min/sec

❑ Reportings - 3 Topics

- ❑ Running Reports - 5:29 min/sec
- ❑ Loading New Reports - 5:51 min/sec
- ❑ Exporting Reports - 2:04 min/sec

❑ Users - 4 Topics

- ❑ Adding a new user - 5:55 min/sec
- ❑ Changing a Users Role(s) - 1:30 min/sec
- ❑ Changing a Users Password - 1:34 min/sec
- ❑ Assigning User Locations - 1:26 min/sec

❑ Discounting - 3 Topics

- ❑ Adding Discount Scheme - 3:59 min/sec
- ❑ General - Discounting - 3:22 min/sec
- ❑ Product Discount Set up - 1:41 min/sec

- ❑ EOM Processing & Statements - Not available - [EOM Procedures & Statement Processing](#)

Total - 22 Training Topics/Videos

Total Time - 70.28 min/sec

Insurance Training - 4 Topics

- PetSure Policy Information - 10:09 min/sec
- Submitting An E-Claim - Option 1 - 9:10 min/sec
- Submitting an E-Claim - Option 2 - 6:39 min/sec

- Cancel An E-Claim - 1:57 min/sec

Total - 4 Training Topics/Videos

Total Time - 27.15 min/sec

Grand Total Time - All Courses - 245.85 min/sec = 4hrs 10 min.

Total Videos = 95 videos