

Practice Management System Training

Blueprint, Sycle, CounselEar

Blueprint Solutions

Date/Time: Wednesday, March 25th, 1-2pm ET

Agenda Items:

How to track

- KPIs (closure, return, cancellation/no-show, third party rates)
- Opportunities/Appointments
- Managed Care vs. Private Pay

In addition

- Dashboards
- Reports
- Database management / patient marketing lists
- Online scheduling

Recording:

<https://blueprintoms.webex.com/recordingservice/sites/blueprintoms/recording/playback/df5080883de94666ab71dc462e92d02f>

Sycle (not Sycle PRO)

Date/Time: Wednesday, April 1st, 11-12pm ET

Agenda:

How to track

- Managed Care vs. Private Pay
- Appointment types
- Referral sources
- Service types / fitting fees

In addition

- Reports (KPIs, etc.)
- Marketing Lists
- Online booking options

Recording:

https://drive.google.com/file/d/1AByMJHrAEKFak89rnAGuGvmPsKSeE_W7/view?ts=5e84f6dc
(you may have to submit your email address to request permission to view the recording)

CounselEar

Date/Time: Wednesday, April 1st, 2-3pm ET

Agenda Items:

How to track

- KPIs
- Opportunities
- TPA (third party administrator) vs. private pay – appointments & devices

In addition

- Widgets
- QuickBooks integration
- Line Item Report Generator
- Inventory Process
- Opportunity Management

Recording:

<https://transcripts.gotomeeting.com/#/s/d8c775f47916c3b1bb43b2b4f2ebb7f5142c3f49f35258a81c89631558a0e163>

Sandbox Credentials

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