

**Centricity<sup>®</sup> Practice Solution**

**Practice Management CBT**

**Role-Based Course Guide**





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## Centricity Practice Solutions Practice Management (CPS PM)

### Role-Based Course Guide

This role based course guide is intended to help you determine which courses should be completed based on a user’s role in the organization. Although roles vary by organization, the guide can be used as a baseline when assigning courses to individuals.

Depending on your organization’s description of a particular role, you may need to assign additional courses or perhaps exclude courses listed in the guide.

If you have questions or need assistance assigning courses, please email us at [ambulatoryapps@ge.com](mailto:ambulatoryapps@ge.com)





Front Desk - Registration			
Course Name	Time	Course Name	Time
<b>Scheduling Module Introduction</b>	0:05:29	Pt Reg Financial Tab	0:02:56
Book Appt New Patient	0:02:03	Pt Reg Scanning into CPS	0:04:24
Book Appt Est Patient	0:01:21	Pt Reg On Demand Statements	0:01:20
Reschedule Appointment	0:01:13	Pt Reg Verify Eligibility Manually	0:01:13
Modify Appointment	0:01:09	Create Worker's Comp Case	0:04:03
Cancel Appointment	0:01:12	Create Referral Case	0:02:45
View Appointment Activity	0:00:46	Create Accident Case	0:03:12
Print Preview Superbills	0:01:20	Pt Reg Contacts Tab	0:01:05
Print Preview Profiles	0:01:26	Pt Reg Create Recall	0:01:53
Confirming Appointments	0:01:57	<b>Billing Overview</b>	0:07:56
Next Available Appt Weekly View	0:02:58	Create Batch	0:02:17
Create Recall	0:03:37	Visit - Trans Tab - Post Pt Copays	0:01:59
Create Appt Set	0:03:41	Print Preview Receipt	0:01:14
Create Workers Comp Case	0:05:52	Billing - On Demand Statements	0:01:12
Create Referral Case	0:02:23	Billing Criteria	0:01:43
Create Waiting List	0:03:32	<b>Payment Entry Module Introduction</b>	0:03:43
Verify Eligibility Manually	0:02:27	Post Statement Payment	0:02:14
Create Appt Chain	0:04:42	<b>Reports Module Introduction</b>	0:05:00
CheckIn CheckOut	0:02:53	Preview Print Reports Daily Balance	0:01:26
Schedule Views	0:04:11	<b>Trans Management Module Introduction and Criteria</b>	0:02:38
<b>Patient Registration Overview</b>	0:06:34	Trans Management Unapplied Funds, Finding Checks, Reviewing Transactions	0:08:01
Create New Patient	0:07:01	End of Day, Month End Processes - Soft Batch Closing, Hard Closing	0:15:56
Pt Reg Appts Tab	0:02:34	<b>Account Summary Module Introduction and Functionality</b>	0:03:28
Pt Reg Historical Data Tab	0:01:14	<b>CURRICULUM TOTAL TIME</b>	<b>2:33:13</b>



<b>Schedulers</b>	
<b>Course Name</b>	<b>Time</b>
<b>Scheduling Module Introduction</b>	0:05:29
Book Appt New Patient	0:02:03
Book Appt Est Patient	0:01:21
Reschedule Appointment	0:01:13
Modify Appointment	0:01:09
Cancel Appointment	0:01:12
View Appointment Activity	0:00:46
Print Preview Superbills	0:01:20
Print Preview Profiles	0:01:26
Confirming Appointments	0:01:57
Next Available Appt Weekly View	0:02:58
Create Recall	0:03:37
Create Appt Set	0:03:41
Create Workers Comp Case	0:05:52
Create Referral Case	0:02:23
Create Waiting List	0:03:32
Verify Eligibility Manually	0:02:27
Create Appt Chain	0:04:42
CheckIn CheckOut	0:02:53
Schedule Views	0:04:11
<b>Patient Registration Overview</b>	0:06:34
Create New Patient	0:07:01
Pt Reg Appts Tab	0:02:34
Pt Reg Historical Data Tab	0:01:14
Pt Reg Financial Tab	0:02:56
Pt Reg Verify Eligibility Manually	0:01:13
Create Worker's Comp Case	0:04:03
Create Referral Case	0:02:45
Create Accident Case	0:03:12
<b>Reports Module Introduction</b>	0:05:00
Preview Print Reports Daily Balance	0:01:26
<b>Account Summary Module Introduction and Functionality</b>	0:03:28
<b>CURRICULUM TOTAL TIME</b>	<b>1:35:38</b>



<b>Billers</b>			
<b>Course Name</b>	<b>Time</b>	<b>Course Name</b>	<b>Time</b>
<b>Scheduling Module Introduction</b>	0:05:29	Approve Visits	0:02:26
Print Preview Superbills	0:01:20	Batch Visits	0:02:38
<b>Patient Registration Overview</b>	0:06:34	Print Preview Receipt	0:01:14
Create New Patient	0:07:01	Billing - On Demand Statements	0:01:12
Pt Reg Appts Tab	0:02:34	Attach Case to Visit	0:01:29
Pt Reg Historical Data Tab	0:01:14	Diagnosis Search	0:00:48
Pt Reg Financial Tab	0:02:56	<b>Payment Entry Module Introduction</b>	0:03:43
Pt Reg Scanning into CPS	0:04:24	Post Statement Payment	0:02:14
Pt Reg On Demand Statements	0:01:20	Post Single Ins Pymt	0:06:03
Pt Reg Verify Eligibility Manually	0:01:13	Post Bulk Ins Pymt	0:07:40
Create Worker's Comp Case	0:04:03	Post Ins Refund	0:02:22
Create Referral Case	0:02:45	Post Pt Refund	0:01:12
Create Accident Case	0:03:12	Post Conveyance	0:04:41
Create Payment Plan	0:01:43	Post LineInfo/COB	0:03:04
Pt Reg Contacts Tab	0:01:05	Additional Features	0:02:45
<b>Billing Overview</b>	0:07:56	<b>Reports Module Introduction</b>	0:05:00
Create Batch	0:02:17	Preview Print Reports Daily Balance	0:01:26
Visit - Visit Info Tab	0:03:52	<b>Collections Module Introduction</b>	0:03:55
Visit - Notes Tab	0:01:18	<b>Charge Management Module Introduction and Criteria</b>	0:02:23
Visit - Trans Tab - Post Pt Copays	0:01:59	Charge Management Open, Move, Review Charges	0:04:36
Visit - Correspondence Tab	0:01:43	<b>Trans Management Module Introduction and Criteria</b>	0:02:38
Visit - Claims Tab	0:01:28	Trans Management Open, Move, Delete Transactions	0:05:36
Post Charges	0:04:17	Trans Management Unapplied Funds, Finding Checks, Reviewing Transactions	0:08:01
Post Charges Using Charge Sets	0:00:48	<b>Balance Forward Module Introduction and Functionality</b>	0:10:05
Post No Charge No Filing Visit	0:00:56	End of Day, Month End Processes - Soft Batch Closing, Hard Closing	0:15:56
Create New Visit - White Doctor Bag	0:01:51	<b>Task Management Module: Building and Utilizing Queues</b>	0:06:54
Retrieve Charges	0:02:06	<b>Account Summary Module Introduction and Functionality</b>	0:03:28
Void Clone Visits with Conveyance	0:05:32	<b>CURRICULUM TOTAL TIME</b>	<b>3:18:08</b>
Billing Criteria	0:01:43		



<b>Eligibility-Referral-Authorization Coordinator</b>	
<b>Course Name</b>	<b>Time</b>
<b>Scheduling Module Introduction</b>	0:05:29
Modify Appointment	0:01:09
Cancel Appointment	0:01:12
Print Preview Profiles	0:01:26
Confirming Appointments	0:01:57
Verify Eligibility Manually	0:02:27
<b>Patient Registration Overview</b>	0:06:34
Create New Patient	0:07:01
Pt Reg Appts Tab	0:02:34
Pt Reg Historical Data Tab	0:01:14
Pt Reg Scanning into CPS	0:04:24
Pt Reg Verify Eligibility Manually	0:01:13
Create Worker's Comp Case	0:04:03
Create Referral Case	0:02:45
Create Accident Case	0:03:12
Pt Reg Contacts Tab	0:01:05
<b>Billing Overview</b>	0:07:56
<b>Reports Module Introduction</b>	0:05:00
Preview Print Reports Daily Balance	0:01:26
<b>Task Management Module: Building and Utilizing Queues</b>	0:06:54
<b>Account Summary Module Introduction and Functionality</b>	0:03:28
<b>CURRICULUM TOTAL TIME</b>	1:12:29



Claims-EDI Representative			
Course Name	Time	Course Name	Time
<b>Patient Registration Overview</b>	0:06:34	Visit - Notes Tab	0:01:18
Pt Reg Appts Tab	0:02:34	Visit - Trans Tab - Post Pt Copays	0:01:59
Pt Reg Historical Data Tab	0:01:14	Visit - Correspondence Tab	0:01:43
Pt Reg Scanning into CPS	0:04:24	Visit - Claims Tab	0:01:28
Pt Reg Verify Eligibility Manually	0:01:13	Post Charges	0:04:17
<b>Billing Overview</b>	0:07:56	Approve Visits	0:02:26
Create Batch	0:02:17	Batch Visits	0:02:38
Visit - Visit Info Tab	0:03:52	Print Preview Receipt	0:01:14
Create New Visit - White Doctor Bag	0:01:51	Billing - On Demand Statements	0:01:12
Retrieve Charges	0:02:06	Attach Case to Visit	0:01:29
Void Clone Visits with Conveyance	0:05:32	Post Charges Using Charge Sets	0:00:48
Billing Criteria	0:01:43	Post No Charge No Filing Visit	0:00:56
Diagnosis Search	0:00:48	<b>EDI Response Module Introduction and Functionality</b>	0:04:24
<b>Payment Entry Module Introduction</b>	0:03:43	<b>Charge Management Module Introduction and Criteria</b>	0:02:23
Post LineInfo/COB	0:03:04	Charge Management Open, Move, Review Charges	0:04:36
<b>Reports Module Introduction</b>	0:05:00	<b>Trans Management Module Introduction and Criteria</b>	0:02:38
Preview Print Reports Daily Balance	0:01:26	End of Day, Month End Processes - Soft Batch Closing, Hard Closing	0:15:56
Batch Statements Criteria Preview Print and Dunning Messages	0:04:05	<b>Task Management Module: Building and Utilizing Queues</b>	0:06:54
<b>EDI Submission Module Introduction</b>	0:03:13	<b>Account Summary Module Introduction and Functionality</b>	0:03:28
Select/Submit Claims	0:02:25	<b>CURRICULUM TOTAL TIME</b>	2:09:16
Select Submit Statements/Export Files	0:02:29		





<b>Payment Posters</b>	
<b>Course Name</b>	<b>Time</b>
<b>Patient Registration Overview</b>	0:06:34
Pt Reg Appts Tab	0:02:34
Pt Reg Historical Data Tab	0:01:14
Pt Reg Financial Tab	0:02:56
Pt Reg Scanning into CPS	0:04:24
Pt Reg On Demand Statements	0:01:20
Pt Reg Verify Eligibility Manually	0:01:13
Pt Reg Contacts Tab	0:01:05
<b>Billing Overview</b>	0:07:56
Create Batch	0:02:17
Visit - Visit Info Tab	0:03:52
Visit - Notes Tab	0:01:18
Visit - Trans Tab - Post Pt Copays	0:01:59
Visit - Correspondence Tab	0:01:43
Visit - Claims Tab	0:01:28
Print Preview Receipt	0:01:14
Billing - On Demand Statements	0:01:12
Billing Criteria	0:01:43
<b>Payment Entry Module Introduction</b>	0:03:43
Post Statement Payment	0:02:14
Post Single Ins Pymt	0:06:03
Post Bulk Ins Pymt	0:07:40
Post Ins Refund	0:02:22
Post Pt Refund	0:01:12
Post Conveyance	0:04:41
Post LineInfo/COB	0:03:04
Additional Features	0:02:45
<b>Reports Module Introduction</b>	0:05:00
Preview Print Reports Daily Balance	0:01:26
<b>Trans Management Module Introduction and Criteria</b>	0:02:38
Trans Management Open, Move, Delete Transactions	0:05:36
Trans Management Unapplied Funds, Finding Checks, Reviewing Transactions	0:08:01
End of Day, Month End Processes - Soft Batch Closing, Hard Closing	0:15:56
<b>Task Management Module: Building and Utilizing Queues</b>	0:06:54
<b>Account Summary Module Introduction and Functionality</b>	0:03:28
<b>CURRICULUM TOTAL TIME</b>	<b>2:08:45</b>



Insurance - AR Representatives			
Course Name	Time	Course Name	Time
<b>Patient Registration Overview</b>	0:06:34	Create Batch	0:02:17
Pt Reg Appts Tab	0:02:34	Visit - Visit Info Tab	0:03:52
Pt Reg Historical Data Tab	0:01:14	Visit - Notes Tab	0:01:18
Pt Reg Financial Tab	0:02:56	Visit - Trans Tab - Post Pt Copays	0:01:59
Pt Reg Scanning into CPS	0:04:24	Visit - Correspondence Tab	0:01:43
Pt Reg On Demand Statements	0:01:20	Visit - Claims Tab	0:01:28
Pt Reg Verify Eligibility Manually	0:01:13	Post Charges	0:04:17
Create Worker's Comp Case	0:04:03	Approve Visits	0:02:26
Create Referral Case	0:02:45	Billing - On Demand Statements	0:01:12
Create Accident Case	0:03:12	Attach Case to Visit	0:01:29
Pt Reg Contacts Tab	0:01:05	Post Charges Using Charge Sets	0:00:48
<b>Billing Overview</b>	0:07:56	<b>Reports Module Introduction</b>	0:05:00
Void Clone Visits with Conveyance	0:05:32	Preview Print Reports Daily Balance	0:01:26
Billing Criteria	0:01:43	<b>AR Module Introduction and Functionality</b>	0:03:00
Diagnosis Search	0:00:48	<b>Charge Management Module Introduction and Criteria</b>	0:02:23
<b>Payment Entry Module Introduction</b>	0:03:43	Charge Management Open, Move, Review Charges	0:04:36
Post Statement Payment	0:02:14	<b>Trans Management Module Introduction and Criteria</b>	0:02:38
Post Single Ins Pymt	0:06:03	Trans Management Open, Move, Delete Transactions	0:05:36
Post Ins Refund	0:02:22	Trans Management Unapplied Funds, Finding Checks, Reviewing Transactions	0:08:01
Post Pt Refund	0:01:12	End of Day, Month End Processes - Soft Batch Closing, Hard Closing	0:15:56
Post Conveyance	0:04:41	<b>Task Management Module: Building and Utilizing Queues</b>	0:06:54
Post LineInfo/COB	0:03:04	<b>Account Summary Module Introduction and Functionality</b>	0:03:28
Additional Features	0:02:45	<b>CURRICULUM TOTAL TIME</b>	<b>2:35:10</b>



<b>Patient Collectors</b>			
<b>Course Name</b>	<b>Time</b>	<b>Course Name</b>	<b>Time</b>
<b>Patient Registration Overview</b>	0:06:34	Print Preview Receipt	0:01:14
Pt Reg Appts Tab	0:02:34	Billing - On Demand Statements	0:01:12
Pt Reg Historical Data Tab	0:01:14	<b>Payment Entry Module Introduction</b>	0:03:43
Pt Reg Financial Tab	0:02:56	Post Statement Payment	0:02:14
Pt Reg Scanning into CPS	0:04:24	Post Conveyance	0:04:41
Pt Reg On Demand Statements	0:01:20	<b>Reports Module Introduction</b>	0:05:00
Pt Reg Verify Eligibility Manually	0:01:13	Preview Print Reports Daily Balance	0:01:26
Create Worker's Comp Case	0:04:03	<b>Collections Module Introduction</b>	0:03:55
Create Referral Case	0:02:45	Add Correspondence Note Update	0:01:54
Create Accident Case	0:03:12	Bad Debt Write Off Report	0:03:39
Create Payment Plan	0:01:43	Create Custom Letter	0:04:45
Pt Reg Contacts Tab	0:01:05	<b>AR Module Introduction and Functionality</b>	0:03:00
<b>Billing Overview</b>	0:07:56	<b>Trans Management Module Introduction and Criteria</b>	0:02:38
Create Batch	0:02:17	Trans Management Open, Move, Delete Transactions	0:05:36
Visit - Visit Info Tab	0:03:52	Trans Management Unapplied Funds, Finding Checks, Reviewing Transactions	0:08:01
Visit - Notes Tab	0:01:18	End of Day, Month End Processes - Soft Batch Closing, Hard Closing	0:15:56
Visit - Trans Tab - Post Pt Copays	0:01:59	<b>Task Management Module: Building and Utilizing Queues</b>	0:06:54
Visit - Correspondence Tab	0:01:43	<b>Account Summary Module Introduction and Functionality</b>	0:03:28
Visit - Claims Tab	0:01:28	<b>CURRICULUM TOTAL TIME</b>	<b>0:53:36</b>



<b>Clinical Staff</b>	
<b>Course Name</b>	<b>Time</b>
<b>Scheduling</b>	
Scheduling Module Introduction	0:05:29
Schedule Views	0:04:11
Book Appt Est Patient	0:01:21
Reschedule Appointment	0:01:13
Modify Appointment	0:01:09
Cancel Appointment	0:01:12
CheckIn CheckOut	0:02:53
Next Available Appt Weekly View	0:02:58
Create Recall	0:03:37
Create Waiting List	0:03:32
<b>Registration</b>	
Patient Registration Overview	0:06:34
Pt Reg Appts Tab	0:02:34
Pt Reg Historical Data Tab	0:01:14
Pt Reg Contacts Tab	0:01:05
<b>Reports Module Introduction</b>	
Reports Module Introduction	0:05:00
Preview Print Reports Daily Balance	0:01:26
<b>Account Summary Module Introduction and Functionality</b>	0:03:28
<b>CURRICULUM TOTAL TIME</b>	<b>0:48:56</b>



<b>Administrators - Superusers</b>			
<b>Course Name</b>	<b>Time</b>	<b>Course Name</b>	<b>Time</b>
<b>Scheduling Module Introduction</b>	0:05:29	Visit - Correspondence Tab	0:01:43
Book Appt New Patient	0:02:03	Visit - Claims Tab	0:01:28
Book Appt Est Patient	0:01:21	Post Charges	0:04:17
Reschedule Appointment	0:01:13	Approve Visits	0:02:26
Modify Appointment	0:01:09	Batch Visits	0:02:38
Cancel Appointment	0:01:12	Print Preview Receipt	0:01:14
View Appointment Activity	0:00:46	Billing - On Demand Statements	0:01:12
Print Preview Superbills	0:01:20	Attach Case to Visit	0:01:29
Print Preview Profiles	0:01:26	Post Charges Using Charge Sets	0:00:48
Confirming Appointments	0:01:57	Post No Charge No Filing Visit	0:00:56
Next Available Appt Weekly View	0:02:58	Create New Visit - White Doctor Bag	0:01:51
Create Recall	0:03:37	Retrieve Charges	0:02:06
Create Appt Set	0:03:41	Void Clone Visits with Conveyance	0:05:32
Create Workers Comp Case	0:05:52	Billing Criteria	0:01:43
Create Referral Case	0:02:23	Diagnosis Search	0:00:48
Create Waiting List	0:03:32	<b>Payment Entry Module Introduction</b>	0:03:43
Verify Eligibility Manually	0:02:27	Post Statement Payment	0:02:14
Create Appt Chain	0:04:42	Post Single Ins Pymt	0:06:03
CheckIn CheckOut	0:02:53	Post Bulk Ins Pymt	0:07:40
Schedule Views	0:04:11	Post Ins Refund	0:02:22
<b>Patient Registration Overview</b>	0:06:34	Post Pt Refund	0:01:12
Create New Patient	0:07:01	Post Conveyance	0:04:41
Pt Reg Appts Tab	0:02:34	Post LineInfo/COB	0:03:04
Pt Reg Historical Data Tab	0:01:14	Additional Features	0:02:45
Pt Reg Financial Tab	0:02:56	<b>Reports Module Introduction</b>	0:05:00
Pt Reg Scanning into CPS	0:04:24	Preview Print Reports Daily Balance	0:01:26
Pt Reg On Demand Statements	0:01:20	Create Folders with Saved Criteria	0:02:49
Pt Reg Verify Eligibility Manually	0:01:13	Export Reports to Excel	0:01:50
Create Worker's Comp Case	0:04:03	Batch Statements Criteria Preview Print and Dunning Messages	0:04:05
Create Referral Case	0:02:45	<b>Collections Module Introduction</b>	0:03:55
Create Accident Case	0:03:12	Add Correspondence Note Update	0:01:54
Create Payment Plan	0:01:43	Bad Debt Write Off Report	0:03:39
Pt Reg Contacts Tab	0:01:05	Create Custom Letter	0:04:45
Pt Reg Create Recall	0:01:53	<b>AR Module Introduction and Functionality</b>	0:03:00
<b>Billing Overview</b>	0:07:56	<b>EDI Submission Module Introduction</b>	0:03:13
Create Batch	0:02:17	Select/Submit Claims	0:02:25
Visit - Visit Info Tab	0:03:52	Select Submit Statements/Export Files	0:02:29
Visit - Notes Tab	0:01:18	<b>EDI Response Module Introduction and Functionality</b>	0:04:24
Visit - Trans Tab - Post Pt Copays	0:01:59		

**Administrators - Superusers (continued)**



Course Name	Time
<b>Charge Management Module Introduction and Criteria</b>	0:02:23
Charge Management Open, Move, Review Charges	0:04:36
<b>Trans Management Module Introduction and Criteria</b>	0:02:38
Trans Management Open, Move, Delete Transactions	0:05:36
Trans Management Unapplied Funds, Finding Checks, Reviewing Transactions	0:08:01
<b>Balance Forward Module Introduction and Functionality</b>	0:10:05
<b>Financial Dashboard Module Introduction and Functionality</b>	0:03:31
<b>Administration Module Introduction</b>	0:03:06
Creating a New Schedule Template	0:27:24
Extending an Existing Schedule Template	0:07:13
Security and User Management	0:08:17
Creating a New Referring Provider	0:01:58
Creating a New Insurance Carrier	0:04:43
Creating a New Responsible Provider	0:04:33
Creating Allocations Sets	0:12:16
Creating New Fee Schedules	0:13:13
Setting Statement Parameters	0:07:48
Setting Collection Parameters	0:07:59
Creating a New Procedure Code, Duplicate Procedure Code, In-House Code	0:06:52
End of Day, Month End Processes - Soft Batch Closing, Hard Closing	0:15:56
Creating Visit Owners	0:05:32
Create Transaction Column Set	0:12:56
<b>Task Management Module: Building and Utilizing Queues</b>	0:06:54
<b>Account Summary Module Introduction and Functionality</b>	0:03:28
<b>CURRICULUM TOTAL TIME</b>	<b>6:49:18</b>