Tracker Training Overview – Manual Conversion Sites

Overview: ***(For offices <u>manually</u> transferring information into Tracker from their current scheduling and contact management system)***

The Bridge Network's Tracker and ChairSide applications are sophisticated programs with a wide range of features. Professional training is offered by The Bridge Network to give your staff the skills necessary to efficiently use these applications. The training is divided into multiple phases. The information in each phase is presented in one or more training sessions. Although the length differs for each type of session, a training session is typically no longer than four hours.

These are guidelines only and time between phases and points covered vary depending on each office's requirements and abilities. We often modify the training schedule and the points covered depending on each practice's requirements. Also depending on the computer skill level of the staff, the level of comfort with the items covered and the progress of the session, more or less information may be covered than scheduled. ***The Bridge Network will be more than happy to accommodate the office with additional training upon request.***

I. Phase #1 – Tracker Introduction/Scheduler

The first training session can be in the office, online or at TBN's head office. It is ideal that it takes place when an office is not seeing live patients. Since it is often essential that the office be fully functional with Tracker in a short period of time, this phase of training involves an introduction to many of the different functions available in Tracker. The trainer explains the scheduler and contact management features, and may introduce Tracker financials if deemed necessary.

We start our training with the Scheduling to ensure that you are entering relevant and timely patient data. You will be surprised how fast everyone will get comfortable using Tracker's Scheduling features. Please be assured that we will not start by taking your current scheduling system away from you! As you are scheduling patients into your current system, you will also be entering them into Tracker until you are able wean yourself from your current system. The first phase of training is designed to give your office a basic understanding of Tracker and the ability to use Tracker's Schedulers and Contact Management features.

II. Phase #2 – Tracker Financials

A second training session takes place approximately two weeks after the phase one training. The trainer briefly reviews topics covered in the first session and verifies the staff has a solid grasp on the basics of Tracker's Scheduling, Contact Management and Appointment Manager features. We then move into the financial and billing features of Tracker including how to enter outstanding balances; therefore, it is imperative that an up-to-date Aged Receivable report from your current system is run prior to this session. Once the outstanding balances have been entered into Tracker the systems will no longer need to run in parallel and at that point Tracker will be used exclusively. At this point your staff is ready to start using Tracker as its primary practice management system. Staff should be referring to the other system only for historical data.

The trainer will also show the office how to use T-Word. This phase can be broken into two sessions if the staff feels they need additional training. The trainer may choose to introduce the clinical ChairSide Suite applications (if applicable) since they are fully integrated with Tracker. They may also review what the office has entered into Tracker since the first session.

III. Phase #3 – Chairside Suite Clinical Applications (if applicable)

The trainer shows the clinical staff how to use all of the different functionalities of the clinical Chairside applications and also demonstrates how the applications integrate with the Tracker practice management system. **More details about the ChairSide Clinical Application training can be found here.**

IV. Phase #3 or 4 - Power Session/Advanced Tracker Training

This advanced session of Tracker training is usually scheduled one to two months after the last training session is completed. It is much more informal than the first two or three phases and it is more like a Q & A session. The staff is given the opportunity to review what they have learned in the previous phases and also go over the more advanced features of the software so that they may take things to the "next level".

V. Phase #4 or 5 – Database Analysis

This is completed six months to one year after the last phase. We download your Tracker and ChairSide Suite database via a remote connection, and a certified trainer analyzes the information and outlines tools not being used to capacity. The trainer will focus on areas requiring more attention during the training session. The trainer will review the information with the office, decide if and where productivity can be improved and answer any questions or concerns that have come up after completing the previous phases. This training session involves one hour to complete a Tracker analysis and where applicable an additional hour to complete a ChairSide Suite analysis. The analyses are completed in-house. Two to four hours are required for training either onsite or online. Our goal in this session is to enhance the productivity and efficiency in Tracker and ChairSide Suite while effectively managing your office.