



Sales 1-877-60-ATLAS (28527)
International 1-519-842-3740
Support 1-866-762-8527

Clinic: _____
Start Date: _____ Go Live: _____
Trainer: _____
Staff: _____

Initial Setup:

- 1. Program Overview :: CA Screen :: VTC Screen
1. Review Clinic Details Email Settings
2. Provider Setup / Edit
Health Insurance Information
Provider Hours
Color Bands
Provider Appointment Types Set Default
3. Clinic Services Set Default
4. Clinic Inventory
5. User Accounts
Providers
Users
6. Holidays / Vacations / Exception Hours
7. Setup Rooms / Computer Locations
8. (Tech) Configure Network Install Atlas Test Equipment

CA Training Session:

- 13. Starting the Software :: Startup Details / Messages
Version Number: _____
14. Login & Open CASH Drawer
16. Patients:
Add a New Patient
Find patients (3 methods)
Edit Patient file
Assign Card / Fob to patient
Link families
17. Appointments:
Adding appointments
Create Default Care Schedule
Mapping appointments
Appointment Ledger / Appointment Schedule
Printing Day Sheets
Reschedule/Cancel/Delete Appointments
18. Safety Net Clear as Needed
19. Pitstops (3 types)
20. Reports Overview
21. Transactions :: Billing:
From VTC vs Manually entered
Adding Manual Transactions
Payments :: Payment Types :: Credits/Discounts
Modify :: Void - Account History vs. Transaction ledger
Special Rates / Special Services
Statements
21. Financial Care Plans
21. Post Dated Payments

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VTC (Provider) Training Session:

- 22. Open VTC :: F12 Toggle Pat SignIn
- 23. VTC Overview
- 24. Patient Arrival (Sign In) Procedure (manual vs swipe)
 - Arrival vs. Edit Button
- 26. Change Provider
- 27. Care Setup Screen
- 28. Importing Images / Documents
- 29. Attach and Access Template documents
- 30. Programming Buttons
- 31. Entering SOAP Notes
- 32. Using Default Adjustment option for Notes
- 33. Interactive Spine Diagram
- 34. Understand Patient Care area
(Care Plan :: Financial Plan :: Appt Ledger)
- 35. Reading Live Stats area
- 36. Edit SOAP Notes :: Change SOAP date
- 37. Message System (CA vs Patient Messages)
 - Receive Messages
- 38. Educational Components
 - ChiroVMail
 - Mircotics
 - Health Articles / Health Messages
 - NeuroSimulator

General Details Training:

- 39. Calling Feature
 - Activate Calling Feature
 - Record Rooms / Patient Names
 - Setup, Assign & Change Room Status
 - Family calling procedure
 - Delay Calling
- 40. End of Day Procedure
 - Close Atlas on network
 - Clear :: Safety Net / Schedule / Arrival Queue
 - DAILY report
 - CASH report and balance
 - Close CASH
 - Close Atlas
- 41. Data Backup
 - Atlas internal backup process (restore point zip file)
 - Backup options :: media vs online (KineticD)

Insurance Training Follow Up with: _____

- Setup Insurance Companies
- Setup Insurance Coverage Groups/Plans
- Attach Insurance to Patient File / Test
- Understand Insurance History Screen
- Insurance Billing (batches / individual)
- Reconcile Payments
- Generate Reports : Insurance Reports / Billing-Payment