**Agenda for TM2 advanced training 2014**

**Is this course for me?**

This one day course is designed for experienced TM2 users who need to make the most of TM2. The objective of the course is to cover all the details behind the use of TM2 which will enable your practice to run a smooth and efficient business operation. The course is suitable for practice owners, practice managers and reception staff who need to make use of the more advanced functions of TM2.

The course can be attended by experienced TM2 users, or by those who have attended the fundamentals course. Some clients choose to attend both the fundamentals and then the advanced course consecutively.

**How long is the course?**

The courses start at 9.30 and finish around 4pm. There will be frequent breaks and lunch provided.

**What is TM2 group training?**

* TM2 group training courses are now held on a regular basis throughout the year in the UK. The training is run over two days and you can attend either just the fundamentals or advanced day or both.
* You are welcome to bring your own laptop computer to the course which you have pre-loaded with both the TM2 program and a TM2 database. This is especially recommended for the advanced training day. You are welcome to call the support team before attending for advice on how to do this (03333 422 800).
* There will be Wi-Fi available free of charge at the venue so you can login to your own database should you wish.

Throughout the day there will be time for Q&A’s. The majority of attendee’s questions will be answered by practical examples and scenarios as they progress through the course. Every effort will be made to answer any additional questions at the end of the day. All timings are approximate and may vary depending upon the size of the group.

 **0930 – Welcome, course overview.**

**0945 – Introduction**

* What is TM2? Explanation of what a database is and how they work.

 **1000 – The cornerstones of your practice**

* This is a chance for delegates to review their own setup at the same time as appreciating the elements that contribute to accurate finances and reporting for their business. An understanding of these areas will give a sound foundation for more advanced use of TM2.

* **Location**: Explain how multi-location works
* **Stock**: Run through stock items including, the importance of using the correct description, ledger codes, pricing, consultation, stock, cancellation, DNA and stock colour. Introduction to Healthcode as a product.
* **Practitioners**: Ensure that the correct charges are entered (for each location). The importance of correct sessions and especially the use of special sessions in relation to TM2 online. Talk through the advanced tab on the practitioner record, explaining the significance of “employed” versus “self-employed” and practitioner provider codes.
* **Groups**: A talk through the group record focusing upon correct location charges and making sure that the “follow up button is selected” for follow up charges (a common mistake). Run through the settings tab focusing upon the importance of correct invoice settings! Use of the notifications function to help with contract SLA’s and reducing administration burden. Talk through the treatment authorisation tab and how each group may need to be setup slightly differently**.**

 **1100 – Tea Break**

 **1115 – The cornerstones of your practice (continued)**

* **The Patient record**: Review of the patient record. Patient log function and explanation of how the “satisfaction” and complaint button relate to the “BUPA report” (practice group activity stats). Patient letters area. Focus upon the important financial areas on the patient record:
* Define group reference (e.g IPRS, IQED)
* Define policy number (e.g AXA)
* Define and describe authorization codes *The importance here is that if the wrong information in entered then the invoice will be wrong and the clinic might not get paid. This makes up 90% of admin workloads and ruins the cash flow for clinics.*
* Use of alerts

**1200 – How to deal with advanced patient scenarios**

* Learn how to correctly deal with private and insurance patient scenarios. Including discounts, credit notes. Discretionary cancellations and recording cancellation reasons (will relate to reporting later). How to handle temporary authorization codes.
* Use appointment finder to improve efficiency when taking bookings
* Booking multiple appointments

 **1230 - Lunch**

 **1300 – Understanding finance**

* Re-visit the financial journey, defining billing items, invoice and reconciliation. Show the financial items created in a patient account. Manual invoice runs. How to correctly deal with insurance part-payments / excesses. What to do if a patient pays excess upfront.
* How to use invoice wizard to drastically reduce time spent invoicing.
* Use of the Invoice search screen to improve efficiency.
* How to send invoices attached to an email.

 **1400 – Accounting**

* Setting Ledger codes for stock and non-stock items in TM2 options. Setting lodgement reference on the end of day reconciliation report. How to get financial data out of TM2 and the data integrity procedure.

 **1430 - Reporting**

* How to generate the “BUPA” report to save time. Reports for effective financial management of staff, resources and stock. The “top ten” reports every successful practice should be running and when to run them! The process of requesting custom reports for your practice.

 **1500 – Tea Break**

 **1515 – Customising TM2**

* Logos on letters, communication templates, advanced configuration section of TM2 tools/options. Link appointments to cases upon creation, use treatment authorisations for appointments. Use external email (i.e outlook), turning on auto booking confirmations. Customising look ups and labels (payment “vouchers”, cancelation reason, and enquiry source). Customizable labels section. Linked software. Enabling clinical auditing of cases.

**1545 – If there is sufficient time we can cover a brief introduction to TM2 touch clinical notes and how it relates to the bigger picture of running your practice.**