**Agenda for TM2 fundamentals training 2014**

**Is this course for me?**

This one day course is designed for receptionists, practice owners, back-office staff and practitioners who will use the administrative features of TM2 on a daily basis. Please read the agenda below and feel free to call if you have any questions.

No previous TM2 experience is required.

**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. 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. It is hoped that most attendee’s questions will be answered by practical examples and scenarios as they progress through the courses. 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.
* How to login in and out of TM2. Explain the differences between the live and training databases.
* Detailed navigation around the screen, including hot keys, privacy and other useful functions.

**Tea Break**

**1100 - Patient search and the patient record**

* How to use patient search including “more options”
* Patient record in detail, including letters section, definition of group reference, policy number and authorization codes.
* Use of alerts

**1200 - Booking appointments**

* For a new patient (use cases / body site)
* For an existing patient
* From the diary
* From the patient record
* Appointment finder
* Booking multiple appointments

**1230 - Lunch**

**1300 - Private patient workflows**

* Learn how to deal with day to day patient encounters including :
* Patient pays in full
* Patient part-pays
* Patient forgets their wallet
* Patient attends appointment and purchases stock (e.g. ice pack)
* Patient just purchases stock (e.g. ice pack)
* Patient pays for more than one treatment in advance
* Patient splits payment between 2 methods e.g. card and cash

**1330 - Group (insurance) patient workflows**

* How to book an appointment for a patient belonging to a group
* How to record cases
* How to record authorization codes
* How to record temporary authorization code
* Group patient purchases stock

**1400 - Introduction to finance**

* The financial journey of a self-paying patient
* The financial journey of a group patient

**1430 – Tea Break**

**1445 – Invoice runs**

* How to perform a manual invoice run
* How to accept payments from insurance companies
* How to process part-payments from insurance companies
* Day to day reports (end of day reconciliation, cancellations, DNA’s, non-actioned appointments, un-invoiced billing items).

**1545 – Any outstanding questions**