

# Practice Director Setup

This setup guide is to be used with the training videos located at [www.training.practicedirector.com](http://www.training.practicedirector.com) and the written documentation User Guide Administration located at <http://www.practicedirector.com/client-documentation/>

The training video number is listed to left of the section and the documentation page number is listed at the right.

## STEP ONE

Watch the Introduction and Setup Videos

- 1.1 Using Practice Director Training Center
- 2.3 Setup

## STEP TWO

You will use the videos within **Section 3.0 Administration** setup to setup your office information.

- 3.1 Administration Overview
- 3.2 General Administration – Overview
  - Documentation General Administration Overview p.7
- 3.9 Office
  - Office Overview and New p. 25-27
- 3.6 Facilities
  - Facilities Overview and New p. 12-13
- 3.3 Appointment Task
  - Appointment Task Overview and New p. 8-9
- 3.7 Insurance Companies
  - Insurance Companies Overview p. 14
  - Insurance Companies New p. 14-15
  - Insurance Companies New Plans p. 16-17
  - Default Settings p. 18
  - Claim Form Instructions p. 18-23
- 3.8 Labs (Needed if you will be using the Spectacle Order Form within Dispensary)
  - Labs Overview and New p. 23-24
- 3.5 General Administration E-prescribing
  - E-prescribing p. 11
- 3.10 General Administration – Preferred Language
  - Patient Preferred Language p. 28-30
- 3.12 Recall Reason
  - Recall Reason Overview and New p. 31-33
  - Recall Reason Edit p. 34-35
  - Recall Reason Delete p. 35-39
- 3.11 General Administration Reason for Visit
  - Reason for Visit Overview and New p. 30-31

- 3.16 General Administration Groups Tab
  - Groups Overview and New p. 51-52
- 3.13 General Administration -Referral Method
  - Referral Method Overview and New p. 40
- 3.14 General Administration -Stations
  - Stations Overview and New p. 41-42
- 3.15 General Administration - Users
  - Users Overview and New p. 43-45
- 3.17 Provider Management
  - Provider Management Overview and New p. 90-92
- 3.18 Set Up and Modify Provider Schedule
  - Setup/Modify Provider Schedule p. 100-102
  - Setup/Modify Provider Schedule Edit p. 102
- 3.19 Skeleton Schedule
  - Skeleton Schedule Setup Overview and New p. 103-105
- 3.20 Referral Management
  - Referral Management Overview and New p. 95
- 3.21 Resource Management
  - Resource Management Overview and New p. 98-99
- 3.22 Resource Schedule
  - Setup/Modify Resource Schedule Overview and New 106-108
- 3.23 Fee Schedule
  - Fee Schedule p. 87-89
- 3.25 Code Administration Overview
  - Code Administration Overview p. 63
- 3.26 Code Administration Setup (Diagnosis, Modifier, Place of Service, and Procedure Codes have been populated with the most common values)
  - Diagnosis Codes Overview and New p. 64
  - Automatic SNOMED Mapping p. 66-72
  - Modifier Overview and New p. 73
  - Place of Service Overview and New p. 76
  - Procedure Codes Overview and New p. 77-78
  - Office Codes Overview and New p. 74-75
  - Savings Type Overview and New p. 79-80
  - Tax Overview and New p. 80-81
  - Zip Code-City Overview and New p. 82
- 3.27 Revenue Reports Category Setup
  - Revenue Reports Category Overview and New p. 83-86
- 3.31 Revenue Reports Category Linking
  - Revenue Reports Category Overview and New p. 109-110
- 3.24 Clearinghouse Setup
  - Setup Clearinghouse Overview, New, and Edit p. 111-112
- 3.30 Inactivity Timeout
  - Inactivity Timeout p. 117
- 3.29 Emergency Status
  - Emergency Status p. 116

**CALL OR EMAIL YOUR IMPLEMENTATION AND SUPPORT SPECIALIST AND SCHEDULE YOUR ADMIN REVIEW****STEP 3**

You will use the videos within **Section 4.0 Inventory Setup and 7.0 Products Inventory** to setup your availability lists and pricing for Lenses, Lens Options, and Contact Lenses and to setup your Inventory and pricing for Frames. Please contact your consultant if you have any questions on this area, as it is critical to have this setup correctly in order for your lists and pricing to be correct.

**Step A Section 4.0 Inventory Set Up**

## 4.1 Inventory Overview/Basics

## 4.4 Contact Lens

Administration Inventory Setup Contact Lens (CL Step 1) p. 123

Product Setup General Manufacturer's p. 123-125

Product Setup Contact Lens Product Names p. 125-126

Product Setup Contact Lens Categories p. 127

Product Setup Contact Lens Colors p. 127-129

## 4.2 Frames (Complete this section only if you are not going to use Spex UPC. If you are using Spex UPC you will begin the setup in section 7.0)

Administration Inventory Setup Frames (Frames Step 1 w/out Spex UPC) p. 129

Product Setup General Manufacturers p. 130-132

Product Setup Frame Categories p. 132-133

Product Setup Frames Collection p. 134-135

## 4.5 Advance Pricing Frames

Administration Inventory Setup Product Pricing Frames 142-143

Product Pricing Frames Edit p.144

## 4.3 Lens

Administration Inventory Setup Lens (Lens Availability Step 1) p. 136

Product Setup General Supplier's p. 136-138

Product Setup Lens Types p. 138

Product Setup Lens Materials p. 139-140

Product Setup Lens Styles p. 140-141

## 4.6 Lens Product Pricing Overview

Administration Inventory Setup Product Pricing Lens (Lens Availability Step 2) p. 145

## 4.7 Lens Base and Index Pricing

Product Pricing Lens Base Price p. 145-146

Product Pricing Lens Index Price p. 147-148

Product Pricing Example Pricing p. 148-149

## 4.8 Product Pricing Lens Prescription and Prism Pricing

Product Pricing Lens Prescription Price p. 150-151

Product Pricing Prism Price p. 152

**Step B 7.0 Products Inventory**

## 7.3 Browse Spex UPC Overview

Products Browse Spex UPC (Frame Inventory Step 1 if using Spex UPC) p. 153

## 7.4 Browse Spex UPC

Searching and Importing Frames using Spex UPC p. 153-155

Searching and Importing using Manufacturer and Collection p. 155-157

## 7.1 Products Inventory Overview/Basics

## 7.2 Frame Inventory and 7.6 Update Frame Information

Products Inventory Frames Spex UPC Find (Spex UPC Step 2) p. 157-159

Products Inventory Frames Update QOH p. 160-161

Products Inventory Frames Manual Entry (Frame Inventory Step 2 without Spex UPC) p. 162-166

## 7.5 Printing Frame Labels

Printing Frame Labels Using a PC p. 167-169

Printing Frame Labels Using a Mac Version 10.10.5 p. 170-174

## 7.8 Contact Lens

Products Inventory Contact Lens Availability and Inventory Overview and New (Contact Lens Step 2) p. 175-177

Products Inventory Contacts View p. 177

Products Inventory Contact Example p. 178-182

## 7.7 Lens Availability

Products Inventory Lens Availability Overview and New (Lens Step 2) p. 183-185

Products Inventory Lens View p. 185-186

Product Inventory Lens Example p. 186-188

## 7.9 Lens Options

Products Inventory Lens Options Overview and New p. 189-191

Products Inventory Lens Option View p. 191-192

Products Inventory Lens Option Example p. 192-196

**CALL OR EMAIL YOUR IMPLEMENTATION AND SUPPORT SPECIALIST AND SCHEDULE YOUR INVENTORY REVIEW**