Tracker Training Overview – Chiropody Data Conversion Sites

Overview: ***(For offices converting data from their current software into Tracker)***

The Bridge Network's Tracker and ChairSide applications are sophisticated programs with a full 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.***

Pre-Training

Retrieval of Current Data Files

The first step to convert to Tracker is for The Bridge Network to copy your data onto a CD or DVD or upload the data via the Internet to our FTP site. Due to responsibility and insurance issues, The Bridge Network can't come to the office to retrieve current data files.

I. Phase #1 – Tracker Introduction/Scheduler

The purpose of the first session is to train staff on the fundamentals of Tracker before they start to use Tracker in parallel with your current system. All entries made in your system will also show in Tracker. While this can be a tedious task, it is an important and necessary step in order to guarantee a successful conversion from your system to Tracker.

We start our training with the Schedulers because while you are entering relevant and timely patient data, you will get instant benefit from your new computer program. We acknowledge using a different scheduling system can be very intimidating, but you will be surprised how fast everyone will get comfortable using Tracker's Schedulers and rest assured we will not start by taking your current scheduling system away from you! As you're scheduling patients into your current system, and adding or verifying their relevant contact and family information, you will also be entering them into Tracker until you are able wean yourself from your current Schedulers. 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. The trainer will review all the information and, if necessary, guide the office through cleaning up any unnecessary information that was transferred into Tracker as a result of the conversion.

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 then moves into the financial and billing features of Tracker. This phase can also be broken into two sessions if the staff feels they need additional training. The trainer may choose to introduce the clinical Chairside Suite applications since they are fully integrated with Tracker.

It's at this session we show staff how to enter all outstanding balances, therefore, ***it is imperative that an up-to-date Aged Receivable report from your current system is run prior to the session***. At the end of this session, your staff will be ready to start using Tracker as the primary practice management system and your current system as a back up. Staff should be referring to Tracker first for information and using the other system for historical data. Since your staff uses Tracker primarily, the conversion process is essentially complete and the systems will no longer need to run in parallel. At this point, a date can be selected when only Tracker will be used. At the time of the selected date, the other system must be available to access historical data as required.

III. Phase # 3 – Clinical Chairside Suite 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 & Clinical Applications

This advanced session of Tracker training is usually scheduled a 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". Further training on physician and specialist correspondence can be covered in this training session.

V. Phase #4 or 5 – Tracker Database Analysis

This is completed six months to one year after the last phase. We download your Tracker 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 an hour to complete the analysis in-house and two to three hours for training either onsite or online. Our goal in this session is to enhance the productivity and efficiency in Tracker while effectively managing your office.