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Type Ctrl+F simultaneously to open a search box and easily find courses in the catalog.

## eLearning Resources

Total Minutes **82**

### Resources Overview

46

Course ID	Course Name	Course Description	Minutes
SDE_225 <a href="#">(Take Course Now!)</a>	New User Welcome	★ Republished: 3/29/2024 - As a new user to Advantage, learn how to access and view courses within Compulink University, your 24/7 online education portal.	4
ELEARN_160 <a href="#">(Take Course Now!)</a>	eLearning Tools and Resources	★ Republished: 3/15/2024 - Learn about the many education resources available on our client web portal, in Compulink University and in our Online Help file.	22

SDE_185 <a href="#">(Take Course Now!)</a>	Education Resources for Latest Version	★ Republished: 3/15/2024 - Stay in the loop with the Release Notes & Educational Resources Resources document on the Compulink Client Web Portal.	4
SDE_190 <a href="#">(Take Course Now!)</a>	Content Catalogs	Republished: 2/13/2023 - View the Content Catalog of detailed enhancements to exam screens, documents and smart functions.	7
SDE_195 <a href="#">(Take Course Now!)</a>	User Focused Education	★ Republished: 3/15/2024 - Education items, filtered by your user profile, are delivered right to your Advantage desktop.	6
SDE_150 <a href="#">(Take Course Now!)</a>	Client Web Portal Education Resources	Republished: 7/14/2023 - Tour the eLearning and Training Education resources on the client web portal.	3

## Compulink University

33

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Course ID	Course Name	Course Description	Minutes
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<p>SDE_130</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Compulink University Quick Start</p>	<p>★ Republished: 3/15/2024 - Take a quick look at how to log into Compulink University and register for courses.</p>	<p>7</p>
<p>SDE_175</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Accessing Compulink University from Mobile Devices</p>	<p>★ Republished: 4/12/2024 - Learn how to navigate Compulink University from your mobile device.</p>	<p>1</p>
<p>SDE_180</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Compulink University Course Catalog Shopping Cart</p>	<p>★ Republished: 3/29/2024 - The Shopping Cart feature on the Course Catalog page makes course registration simple.</p>	<p>2</p>
<p>SDE_200</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Compulink University: Program Index</p>	<p>★ Republished: 4/30/2024 - Take a quick look at the Advantage Feature Quick Reference Guide on the Course Catalog page.</p>	<p>1</p>
<p>SDE_160</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Creating Student Accounts In Compulink University</p>	<p>★ Republished: 3/29/2024 - Review how to configure your Advantage user accounts for Compulink University access.</p>	<p>5</p>

CU_245 <a href="#">(Take Course Now!)</a>	Compulink University for the Administrator: Overview of the Admin Portal	Republished: 2/15/2024 - Learn how to access and navigate the Compulink University Admin Portal.	4
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CU_260 <a href="#">(Take Course Now!)</a>	CU: Admin Portal Manager Reports	★ Published: 3/15/2024 - Review efficiency reports in the Admin Portal for Compulink University students in your practice.	8
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CU_265 <a href="#">(Take Course Now!)</a>	CU: Admin Bulk Registration	Published: 2/15/2024 -The Bulk Registration tool in Compulink University allows you to enroll/register a group of users into Programs and Courses.	5
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<b>Online Help</b>	3
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Course ID	Course Name	Course Description	Minutes
SDE_170 <a href="#">(Take Course Now!)</a>	Advantage Help User Interface	Republished: 9/15/2022 - Help is a searchable electronic user's guide, designed to give you instant access to the information you need.	3

<b>About V12.8</b>	<i>Total Minutes</i> <b>12</b>
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## What Is New In V12.8

12

Course ID	Course Name	Course Description	Minutes
128_WN_100 <a href="#">(Take Course Now!)</a>	What is New In V12.8	Republished: 1/15/2024 - Review the latest enhancements and updates available beginning in V12.8.0.12.	12

## Activate Advantage

Total Minutes **169**

### New Clients > Implementing Advantage

5

Course ID	Course Name	Course Description	Minutes
AA_410 <a href="#">(Take Course Now!)</a>	Activate: New Client Onboarding	Republished: 6/16/2023 - This course is an overview of the self-paced eLearning tool for Advantage clients who want a quick and comprehensive implementation.	5

### Established Clients > Onboarding New Staff

3

Course ID	Course Name	Course Description	Minutes
SDE_155 <a href="#">(Take Course Now!)</a>	Activate: To Onboard New Staff	Republished: 11/11/2022 - Activate Advantage offers an interactive format that is effective for onboarding new staff or as a refresher for all users.	3

## Admin/Setup

74

Course ID	Course Name	Course Description	Minutes
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AA_306 <a href="#">(Take Course Now!)</a>	Activate: General Table Setup	Republished: 7/28/2023 - This course teaches Administrators and Management staff the basics of General Table Setup.	18
AA_408_2 <a href="#">(Take Course Now!)</a>	Activate: System & Financial Table Setup	Published: 11/29/2023 - Learn about System Setup default efficiencies and Financial Tables in this Activate Advantage course.	23
AA_308 <a href="#">(Take Course Now!)</a>	Activate: System and Financial Table Setup	Republished: 6/1/2022 - Learn about System Setup default efficiencies and Financial Tables in this Activate with Advantage course.	23
AA_311 <a href="#">(Take Course Now!)</a>	Activate: Appointment Setup	Republished: 1/15/2024 - This course teaches Clients how to setup and manage Appointment-related Tables. - Length: 10 Minutes	10

**Functionality**

87

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Course ID	Course Name	Course Description	Minutes
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AA_321 <a href="#">(Take Course Now!)</a>	Activate: Patient Services & Demographics	Republished: 8/15/2023 - This course introduces Patient Demographics features. Upon completion, attendees will be able to create and search for a patient record, add insurance information and much more.	25
AA_316 <a href="#">(Take Course Now!)</a>	Activate: Appointment Scheduling	Republished: 8/15/2023 - This course teaches attendees the basics of Appointment Scheduling: Scheduling, Re-scheduling and Canceling Appointments.	7
AA_221_PV <a href="#">(Take Course Now!)</a>	Activate: EHR Basics for Addiction & Psych	Republished: 11/29/2023 - This course introduces features related to EHR documentation and functionality. Topics include layouts, icons, shortcuts and government compliance.	21
AA_326 <a href="#">(Take Course Now!)</a>	Activate: Insurance & Ledger Basics	Republished: 7/28/2023 - This course teaches Insurance and Ledger Basics.	24
AA_231_2 <a href="#">(Take Course Now!)</a>	Activate: Miscellaneous Inventory	Republished: 12/22/2023 - Learn the basics of Inventory Setup, including how to update and maintain the Vendors table and how to add stock items to the Inventory Database.	10

# Advantage Patient Experience

Total Minutes **74**

## Admin/Setup

55

Course ID	Course Name	Course Description	Minutes
SDAPX_100 <a href="#">(Take Course Now!)</a>	APX: About Advantage Patient Experience	Published: 1/26/2023 - Advantage Patient Experience, powered by Promptly, is an online patient experience suite, designed to enhance patient touchpoints, increase payments and automate processes. Here's a brief look at some of the available features.	3
SDAPX_105 <a href="#">(Take Course Now!)</a>	APX: Implementation Process Overview	Published: 1/26/2023 This presents a broad overview of what to expect throughout the setup and integration process for Advantage Patient Experience, powered by Promptly.	5
APXTAB_100 <a href="#">(Take Course Now!)</a>	APX: Table Setup I	Published: 1/24/2023 - Learn to set up the Users and Users Groups tables on the Promptly Admin site.	6
APXTAB_105 <a href="#">(Take Course Now!)</a>	APX: Table Setup II	Published: 1/24/2023 - Learn to set up the Configuration, Decision Tree and Mandatory Fields tables on the Promptly Admin site.	19



<p>APXTAB_110</p> <p><a href="#">(Take Course Now!)</a></p>	<p>APX: Table Setup III</p>	<p>Published: 1/26/2023 - Learn to set up the Broadcast, Questionnaire, Personal Message Types and Follow-up Worklists Actions tables on the Promptly Admin site.</p>	<p>8</p>
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<p>APXTAB_115</p> <p><a href="#">(Take Course Now!)</a></p>	<p>APX: Table Setup IV</p>	<p>Published: 1/26/2023 - Learn how to set up the Canned Messages, Manage Reply, Notifications, Invitation Template and E-Mail Templates Tables in Promptly.</p>	<p>14</p>
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<b>Functionality</b>	<i>19</i>
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Course ID	Course Name	Course Description	Minutes
<p>APX_200</p> <p><a href="#">(Take Course Now!)</a></p>	<p>APX: Client Dashboard</p>	<p>Published: 1/24/2023 - This course shows an example of the Promptly Client Dashboard as it appears once you've completed Implementation and Setup.</p>	<p>15</p>
<p>SDAPX_110</p> <p><a href="#">(Take Course Now!)</a></p>	<p>APX: Recommended Daily Workflow</p>	<p>Published: 1/26/2023 - Review a recommended daily workflow for Advantage Patient Experience, powered by Promptly.</p>	<p>4</p>

**AdvantageRCM**

*Total Minutes* **17**

## Compulink's RCM Billing Service

17

Course ID	Course Name	Course Description	Minutes
RCM_110 <a href="#">(Take Course Now!)</a>	What is Advantage RCM?	Published: 3/15/2022 - This course provides a brief introduction to AdvantageRCM and includes Daily and Weekly tasks performed by the Compulink RCM Team and your practice	15
SDRCM_115 <a href="#">(Take Course Now!)</a>	RCM: Daily Pending Claims with Errors Communications	Published: 7/14/2023 - The designated RCM contact in your practice will receive daily communications when pending claims with errors exceed \$10.00.	2

## Appointments

Total Minutes **124**

### Admin/Setup

81

Course ID	Course Name	Course Description	Minutes
APPT_340 <a href="#">(Take Course Now!)</a>	Appointment Scheduling Table Setup	Republished: 1/31/2024 - The following appointment setup tables are reviewed in this course: Categories, Reasons and Status.	13

APPT_315 <a href="#">(Take Course Now!)</a>	Appointment Template Setup	Republished: 10/12/2023 - Learn about the different template types, how to create a template and how to set up your template schedule. A demonstration of the Move Template utility is included.	29
APPT_320 <a href="#">(Take Course Now!)</a>	Appt. Utilities: Column and Resource Options	Republished: 1/31/2024 - Review the Appointment Utility Column and Resource commands that are used to customize your schedule views.	10
RPT_APPT_110 <a href="#">(Take Course Now!)</a>	Daily Appointment Reports	★ Republished: 3/29/2024 - This course reviews each of the reports of the Appointment > Daily menu.	14
RPT_APPT_105 <a href="#">(Take Course Now!)</a>	Appointment Analysis Reports	★ Republished: 3/29/2024 - This course reviews the report parameter options and report examples for each of the Appointment Analysis Reports: Activity, Statistics and Utilization.	15

## Functionality

43

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Course ID	Course Name	Course Description	Minutes
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APPT_325 <a href="#">(Take Course Now!)</a>	Appointment Scheduling I	Republished: 10/13/2023 - Learn how to schedule, reschedule, change the schedule view, modify appointment status, cancel and move appointments.	13
APPT_330 <a href="#">(Take Course Now!)</a>	Appointment Scheduling II	Republished: 10/12/2023 - Learn about the following Appointment commands: Search, Refresh, Block, Print, Wait List and Daily Notes.	17
APPT_345 <a href="#">(Take Course Now!)</a>	Multiple Resource Scheduling	Published: 08/31/2023 Review the setup and functionality associated with scheduling appointments across multiple resources. Length: 10 Minutes	10
SDAPPT_100 <a href="#">(Take Course Now!)</a>	Provider Web Appointment Viewer	Published: 10/13/2023 - Learn about the new Provider Web Appointment Viewer, a quick way for Providers to view their schedule on-the-go.	3

## Billing: Insurance

Total Minutes **342**

## Admin/Setup

37

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Course ID	Course Name	Course Description	Minutes
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<p>EDI_490</p> <p><a href="#">(Take Course Now!)</a></p>	<p>EDI: Completing the Provider Setup Form (PSF)</p>	<p>Published: 12/17/2021 - The Provider Setup Form helps Compulink determine your billing profile. Learn what information is required and how to complete the fields.</p>	<p>8</p>
<p>INS_205</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Insurance Billing: Basic Table Setup</p>	<p>★ Republished: 4/12/2024 - Learn about the table setup required for billing professional insurance claims (CMS1500) through your Advantage software.</p>	<p>17</p>
<p>EDI_320</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Ins Billing: Table Setup for Institutional Claims (UB04)</p>	<p>Republished: 12/2/2022 - Learn about the table setup required for billing institutional insurance claims (UB04) through your Advantage software.</p>	<p>6</p>
<p>SDFTAB_110</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Compulink Update Utility for Payor/Claim Edits</p>	<p>Published: 4/1/2022 - Use the Compulink Update utility for on-demand downloads of the latest Compulink-maintained Payors and Claim Edits.</p>	<p>2</p>
<p>SDL_205</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Incident to Billing</p>	<p>Republished: 12/2/2022 - Learn how to set up the software and post charges using the incident-to-bill feature.</p>	<p>4</p>

## Change Healthcare Outage

29

Course ID	Course Name	Course Description	Minutes
EDI_590 <a href="#">(Take Course Now!)</a>	Optum iEDI Clearinghouse during CHC Outage	★ Republished: 4/30/2024 - Learn how to prepare for and use the Optum iEDI portal for temporary claims processing during the CHC outage.	9
EDI_595 <a href="#">(Take Course Now!)</a>	EDI: Resolving Optum iEDI Rejections	★ Published: 4/4/2024 - Review how to identify and resolve common claim rejections when using the temporary Optum iEDI clearinghouse solution.	11
EDI_600 <a href="#">(Take Course Now!)</a>	Emdeon Vision Clients Restoration	★ Published: 5/1/2024 - Current Emdeon Vision customers need to complete an onlin form to restore services using the Optum Platform.	3
EDI_585 <a href="#">(Take Course Now!)</a>	EDI: Direct Claim Submission During CHC Outage	★ Published: 3/7/2024 - Learn about the new Direct Claim Submission option available in Version 12.8.0.14. This is a temporary stopgap option for payors accepting direct claims during the Change Healthcare outage.	6

## Eligibility

34

Course ID	Course Name	Course Description	Minutes
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EDI_525 <a href="#">(Take Course Now!)</a>	EDI: Change Healthcare Eligibility	Published: 9/29/22 - Learn how to obtain insurance benefit information directly from your Advantage software. We walk through the request and enrollment process & demonstrate Batch Eligibility.	20
EDI_540 <a href="#">(Take Course Now!)</a>	EDI: Insurance Eligibility Verification	Published: 1/31/2024 - Learn the process of verifying eligibility for both an individual patient and in a batch format and review the information included on the eligibility report.	6
EDI_545 <a href="#">(Take Course Now!)</a>	EDI: Insurance Eligibility Report Details	Published: 1/31/2024 - Review information within an Eligibility Detail Report and troubleshoot common reasons for failed transactions.	8

## Claims

128

Course ID	Course Name	Course Description	Minutes
BILL_100 <a href="#">(Take Course Now!)</a>	Tips for Billing Success	Published: 4/24/2023 - Learn some practical tips for billing success with insurance claims and patient statements.	10

<p>LEDG_715</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Claims: Table Setup &amp; Posting Workflow V12.7+</p>	<p>Republished: 6/27/2023 - Review key look-up tables associated with claims processing, V12.7/greater. Proper setup of the patient's insurance record and posting ledger charges complete the workflow.</p>	<p>20</p>
<p>SDINS_110</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Pooled/Past/Pending Insurance</p>	<p>Republished: 11/22/2022 - Explore the difference between an Active Pooled, Past or Pending Insurance carrier.</p>	<p>4</p>
<p>EDI_535</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Insurance Billing: Basic Charge Posting (CMS 1500)</p>	<p>Published: 08/31/2023. Learn the proper way to post ledger charges in preparation for Professional claims (CMS1500) Insurance Billing. Length: 19 Minutes</p>	<p>19</p>
<p>LEDG_710</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Insurance Billing: Expanded Claim Screens V12.7+</p>	<p>Published: 5/30/2023 - Review the Expanded Claim Screen area in detail, including references to where information appears on the applicable claim form.</p>	<p>21</p>
<p>LEDG_570</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Insurance Billing: Expanded Claim Screens</p>	<p>Republished: 10/19/2022 - This course reviews the expanded claim information accessed with the 'Expand' button in the Ledger Add/Edit/Insert Charge Window.</p>	<p>23</p>



<p>EDI_335</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Insurance Billing: Charge Posting (UB04)</p>	<p>Published: 11/24/2020 - Learn the proper way to post ledger charges in preparation for Institutional claims (UB04) Insurance Billing.</p>	<p>10</p>
<p>SDEDI_140</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Claim Validation Tool V12.7+</p>	<p>Republished: 6/1/2023 - Learn about ways to automate Claim Validation.</p>	<p>2</p>
<p>FUNC_250</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Function: Insurance Billing</p>	<p>Republished: 10/24/2022 - Explore the Insurance Billing Function, including new options for the EDI Report Viewer introduced with V12.5.</p>	<p>8</p>
<p>SDL_185</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Ledger: Payor Notes</p>	<p>★ Republished: 3/15/2024 - This brief tutorial presents the Ledger Payor Notes functionality with the companion RCM Insurance Follow-up Worklist.</p>	<p>4</p>
<p>SDFUNC_210</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Reset Claim Billing Utility</p>	<p>★ Published: 4/12/2024 - The Reset Claim Billing Utility is a quick and efficient way to remove the billed dates on claim batches, allowing them to be rebilled.</p>	<p>5</p>

SDINS_115 <a href="#">(Take Course Now!)</a>	Rebilling an Insurance Claim	Republished: 10/24/2022 – Review the options for setting an individual claim to be re-billed.	2
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## Efficiency Tools & Reports

41

Course ID	Course Name	Course Description	Minutes
LEDG_615 <a href="#">(Take Course Now!)</a>	Account Management Tools - Before And After Billing	★ Republished: 3/15/2024 - Learn about the many tools available to manage your accounts including Reports, Worklists and Payor Notes.	20
SDINS_130 <a href="#">(Take Course Now!)</a>	Missing Charges By Location Worklist	★ Published: 5/15/2024 - Find patients with a signed medical record but no charges posted by Date of Service and Location.	2
SDINS_120 <a href="#">(Take Course Now!)</a>	Insurance Related Worklists	Republished: 12/2/2022 - A review of the following Insurance related worklists: Post Payment Statement Review, Insurance Receivable Aging and Insurance Unbilled Charges.	3

SDINS_125 <a href="#">(Take Course Now!)</a>	Denial Claims Worklist	Published: 10/31/2023 - The Denial Claims worklist is an efficiency tool to locate and work all denied claims sent electronically.	2
EDI_350 <a href="#">(Take Course Now!)</a>	EDI Reports & Remittance Viewers	Published Date: 6/7/2022 - The EDI Report Viewer helps you manage electronic claims submissions, either direct to a Payor or through a clearinghouse, such as Change Healthcare. Length: 14 Minutes	14

## Change Healthcare Resources

22

Course ID	Course Name	Course Description	Minutes
EDI_340 <a href="#">(Take Course Now!)</a>	Change Healthcare Customer Portal	Republished: 5/19/2022 - Tour the many resources available on the Change Healthcare Customer Portal. Get a bird's eye view of claim activity on the dashboard, work rejections and access the Education Center.	9
SDEDI_115 <a href="#">(Take Course Now!)</a>	EDI: What Is RPA?	Republished: 12/2/2022 - Take a brief tour of Change Healthcare's newest revenue cycle management system, RPA, and learn about the benefits of utilizing RPA.	5

<p>SDEDI_120</p> <p><a href="#">(Take Course Now!)</a></p>	<p>RPA: Claims Workflow Recommendations</p>	<p>Republished: 12/2/2022 - Claims workflow recommendations in RPA are covered in this course.</p>	<p>6</p>
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<p>SDEDI_125</p> <p><a href="#">(Take Course Now!)</a></p>	<p>RPA: ERA/Payment Workflow Recommendations</p>	<p>Published: 6/9/2021 - This is a brief look at ERA/Payment Workflow Recommendations in RPA.</p>	<p>2</p>
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**Remittance** 51

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Course ID	Course Name	Course Description	Minutes
<p>EDI_510</p> <p><a href="#">(Take Course Now!)</a></p>	<p>EDI: Remittance Part 1: Setup and Viewing</p>	<p>Published: 8/18/2022 - This course provides information you should be aware of prior to starting Remittance Posting.</p>	<p>10</p>
<p>EDI_515</p> <p><a href="#">(Take Course Now!)</a></p>	<p>EDI: Remittance Part 2: Remittance Posting</p>	<p>Published: 8/25/2022 - Remittance Part II gets you started with auto-posting ERAs. Walk through the basic setup for new payors in the Payor Setup Wizard and learn about the available resources.</p>	<p>19</p>

EDI_520 <a href="#">(Take Course Now!)</a>	EDI: Remittance Part 3: Payer Wizard Advanced Features	Published: 9/15/2022 - Review customizable configurations in the Payer Setup Wizard Advanced Features: Advanced Remark Code Setup, Never Post Codes and the Advance Adjustment Max button.	22
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## Billing: Patient

Total Minutes **41**

### Patient Billing

41

Course ID	Course Name	Course Description	Minutes
BILL_100 <a href="#">(Take Course Now!)</a>	Tips for Billing Success	Republished: 4/24/2023 - Learn some practical tips for billing success with insurance claims and patient statements.	10
FUNC_320 <a href="#">(Take Course Now!)</a>	Functions: Acct. Statement & Payment Overdue Notices	Republished 2/15/2024 - This course reviews the Account Statement and Payment Overdue Notice functions, defining the options and demonstrating how to run the processes.	15
EXBILL_140 <a href="#">(Take Course Now!)</a>	Patient Billing & Statements Service	Published 08/31/2023 Learn how to request, install and set up the Patient Billing and Statements service from Change Healthcare/Optum. Review the process for preparing Recalls and Statements and how to transfer files using the Filezilla software.	16

## Communication

Total Minutes **68**

## Admin/Setup

13

Course ID	Course Name	Course Description	Minutes
SDPM_180 <a href="#">(Take Course Now!)</a>	Electronic Faxing Setup > Updox	Published: 8/27/2021 - Take a quick look at the setup required to send/receive electronic faxes with your Advantage software using Updox.	4
DIRECT_100 <a href="#">(Take Course Now!)</a>	Get Your Direct E-Mail from Updox	Published: 9/16/2022 - Walk step by step through the process of obtaining a Direct E-Mail address, used for secure messaging.	9

## Direct Secure Messages

10

Course ID	Course Name	Course Description	Minutes
FUNC_235 <a href="#">(Take Course Now!)</a>	Direct E-Mail Receive Function	Published: 8/12/2021 - A review of how the Direct E-Mail Receive Functions imports CCDs into your software and provides instructions on how to reconcile CCDs to your patient records.	10

## Electronic Faxes

12

Course ID	Course Name	Course Description	Minutes
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SDPM_155 <a href="#">(Take Course Now!)</a>	E-Faxing in Advantage Overview	Republished: 1/31/2024 - Let's take a bird's eye view of how Electronic Faxing with Updox works in your Advantage software	4
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SDPM_185 <a href="#">(Take Course Now!)</a>	Receiving Electronic Faxes	Published: 8/27/2021 - Take a tour of the InBox and learn how to receive incoming E-Faxes into your Advantage software.	5
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SDPM_190 <a href="#">(Take Course Now!)</a>	Transfer E-Fax To Another Account	Published: 5/11/2023 - Learn how to correct an incoming fax that was accidentally transferred to the wrong patient account.	3
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<b>Instant Messaging</b>	4
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Course ID	Course Name	Course Description	Minutes
SDPM_220 <a href="#">(Take Course Now!)</a>	Instant Messaging	Published: 10/31/2023 - Quickly send a message to a staff member or group using Instant Messaging through your Advantage software. Includes the Instant Message Review report for administrators.	4

<b>Patient &amp; Professional Communications</b>	29
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Course ID	Course Name	Course Description	Minutes
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OO_250 <a href="#">(Take Course Now!)</a>	Generating Documents	Republished: 1/31/2024 - Review printing, faxing, sending a direct E-Mail and uploading letters to the Patient Portal.	13
OO_300 <a href="#">(Take Course Now!)</a>	Signing Documents	Published: 11/3/2022 - Review the Needs Signature Functionality and options.	9
SDPM_160 <a href="#">(Take Course Now!)</a>	Automating Communications: Patient Contacts & Referrals	Published: 6/4/2021 - Learn how to automate delivery of after-visit summaries and letters upon sign-off of the patient's exam.	5
SDPAT_110 <a href="#">(Take Course Now!)</a>	Patient Messaging from your Advantage Software	Republished: 10/31/2023 - Explore the E-Mail and Text messaging options available under the Patient Print command.	2

## Customization

*Total Minutes* **127**

## Desktop Configuration

16

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Course ID	Course Name	Course Description	Minutes
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SDPM_195 <a href="#">(Take Course Now!)</a>	GUI Customization	Republished: 2/15/2024 - Learn how you can customize the colors of your Advantage screens and toolbar icons.	5
PAT_350 <a href="#">(Take Course Now!)</a>	Custom Screens By Login ID	Published: 2/4/2021 - This course reviews the steps of customizing a screen by Login ID using a .CFG Screen Configuration File.	8
SDSATAB_100 <a href="#">(Take Course Now!)</a>	Setting Grid Menu Preferences	Published: 8/11/2021 - This short course covers setting the user's grid menu preference of the ellipsis or navigation commands.	3

## Add Custom Fields

11

Course ID	Course Name	Course Description	Minutes
SCR_212 <a href="#">(Take Course Now!)</a>	Modify Database Tables	Published: 2/4/2021 - This course reviews how to add a custom field in the Modified Database Tables.	11

## Form Editor

17

Course ID	Course Name	Course Description	Minutes
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SCR_230	Form Editor	Published: 12/18/2020 - This course reviews Forms in the software and how Form Editor works.	17
<a href="#">(Take Course Now!)</a>			

## Screen Builder

70

Course ID	Course Name	Course Description	Minutes
SCR_206	SB: Intro To Screen Builder	Published: 5/3/2021 - An introduction to the Screen Builder Utility for clients using the Advantage Masters software.	14
<a href="#">(Take Course Now!)</a>			
SCR_207	SB: For Essentials Users	Published: 5/3/2021 - This course reviews Screen Builder options for clients that have the Advantage Essentials software.	11
<a href="#">(Take Course Now!)</a>			
SCR_215	SB: Customizing Screens	Published: 3/5/2021 - This course reviews how to use customize screens in Screen Builder as well as using several Object Properties.	9
<a href="#">(Take Course Now!)</a>			

SCR_210 <a href="#">(Take Course Now!)</a>	SB: Tools And Objects	Published: 2/17/2021 - This course reviews Screen Builder Objects. Prerequisite course: Intro to Screen Builder.	14
SCR_213 <a href="#">(Take Course Now!)</a>	SB: Image Objects	Published: 2/17/2021 - This course reviews Screen Builder Image Objects and the steps to customize with these Objects.	13
CUST_100 <a href="#">(Take Course Now!)</a>	SB: Hx Multi Record Add Grids	Published: 3/19/2021 - This course reviews how to customize the Health History Grids using the Multi-Record Add Edit Configuration Utility. The course also covers adding a record to the Health History Description Table.	9

### Smart Function

13

Course ID	Course Name	Course Description	Minutes
SME_200 <a href="#">(Take Course Now!)</a>	Smart Function Editor	Published: 4/9/2021 - This course reviews the Smart Function Editor table.	13

### EHR: General Info

Total Minutes **127**

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Course ID	Course Name	Course Description	Minutes
EHR_230 <a href="#">(Take Course Now!)</a>	Configuring Users for Exam Access	Republished: 1/15/2024 - Overview course on Configuring Users for Exam Access in the Login IDs, Login Right Profiles and System Setup areas. Length: 23 Minutes	23
SDEHR_150 <a href="#">(Take Course Now!)</a>	EHR Field Edit Level	Republished: 11/29/2023 - Login Profile Right: EHR Field Edit Level.	3
SDEHR_155 <a href="#">(Take Course Now!)</a>	EHR Multiple Users Accessing One Exam	Republished: 8/11/2022 - Multiple Users can document in the same medical record simultaneously.	4
SDEHR_120 <a href="#">(Take Course Now!)</a>	Create an Encounter Favorite	Republished: 12/15/2023 - This course will walk through the simple steps of creating an encounter favorite for a specific tab.	6

EHR_635 <a href="#">(Take Course Now!)</a>	EHR: Real Time Note Update Engine	Published: 6/27/2023 - Review how the Real Time Note Update Engine works and how note templates are created in your EHR tables.	3
SDEHR_135 <a href="#">(Take Course Now!)</a>	Field Definition Command In EHR	Republished: 11/29/2023 - Quickly find exam field information for custom screens, SQL worklists and Crystal Reports using this new right click option.	2
EHR_240 <a href="#">(Take Course Now!)</a>	SMART Orders Setup Overview	Republished: 12/15/2023 - Learn how to create a new order set or edit an existing one.	12

## Functionality

44

Course ID	Course Name	Course Description	Minutes
SDEHR_115_2 <a href="#">(Take Course Now!)</a>	Exam Efficiencies	Republished: 12/15/2023 - Learn about documentation efficiencies including EHR Normal Values, Data Forwarding Options and Encounter Favorites.	4

<p>EHR_2660</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Exam Locate Command</p>	<p>★ Republished; 4/12/2024 -The Exam &gt; Locate menu offers different options for searching the active Patient's Exam records.</p>	<p>4</p>
<p>SDEHR_160</p> <p><a href="#">(Take Course Now!)</a></p>	<p>EHR: Spell Check</p>	<p>Republished: 11/23/2023 - Review spell checking EHR memo fields.</p>	<p>2</p>
<p>EHR_2650</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Exam Print Command</p>	<p>Republished: 2/29/2024 - Review the Exam Print options including the Audit Report, CCDs, Letters, Reports and more.</p>	<p>15</p>
<p>SDEHR_145</p> <p><a href="#">(Take Course Now!)</a></p>	<p>SMART Orders Window</p>	<p>Republished: 12/15/2023 - See how the Exam SMART Orders functionality streamlines the selection of Assessments, Plans and Orders, based on your patient's diagnosis.</p>	<p>5</p>
<p>SDEHR_165</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Creating an Exam Order Set</p>	<p>Published: 9/14/2023 - Walk through the steps for creating an Order Set.</p>	<p>4</p>

SDEHR_180 <a href="#">(Take Course Now!)</a>	Order Set Auto Build	Published: 10/31/2023 - The Exam Order Set Auto-Build utility automatically creates Order Sets based on the provider's exam documentation history.	2
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EHR_2665_2 <a href="#">(Take Course Now!)</a>	VDE: Visual Documentation Engine	★ Republished: 4/12/2024 - This Visual Documentation Engine (VDE) course shows users how to document Clinical Findings using Base images and condition icons.	8
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**E & M Coding Guidelines** 30

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Course ID	Course Name	Course Description	Minutes
124_EHR_100_2 <a href="#">(Take Course Now!)</a>	Documenting In EHR for the 2021 E&M Coding Changes	Published: 12/31/2020 - Learn how to document in your Advantage software for the 2021 E&M Coding Changes. This course provides instructions for those upgraded to V12.4 as well as a section for documenting in versions prior to V12.4.	17
EHR_245_2 <a href="#">(Take Course Now!)</a>	EHR Fee Posting Window: Internal Counts/Logical Values	Published: 7/28/2023 - Gain an understanding of where the software is looking in the exam records when 'counting' data points to determine the recommended E&M coding level to charge for.	13

**EHR: Psych**

*Total Minutes* **46**

## Psych Features

46

Course ID	Course Name	Course Description	Minutes
EHR_2555_P <a href="#">(Take Course Now!)</a>	Medication Management Workflow	Published: 6/16/2023 - Review the Advantage tools available in to assist you with managing your client's medications.	14
EHR_2550_P <a href="#">(Take Course Now!)</a>	New HiRes Layouts And Session Note Tab Updates	Published: 4/22/2021 - This will be a review of the new High-Resolution Layouts released with the Version 12.4 update and the Session Note Tab changes.	5
EHR_2500_P <a href="#">(Take Course Now!)</a>	Workflow for Therapists	Published: 6/14/2021 - This course reviews a New Client Intake and Treatment Service Plan Workflow for Therapists.	14
EHR_2505_P <a href="#">(Take Course Now!)</a>	Workflow for Psychiatrists	Published: 4/7/2022 - Documenting a New Patient Intake with Medication Monitoring for Psychiatry/Nurses/Practitioners.	13

## E-Prescribing

*Total Minutes* **124**



Course ID	Course Name	Course Description	Minutes
ADERX_250 <a href="#">(Take Course Now!)</a>	AdvantageERx: Introduction	Published: 9/10/2021 - For practices on-boarding or migrating from New Crop to AdvantageERx. Provides a general overview of the project from start to finish and how to prepare.	11
ADERX_270 <a href="#">(Take Course Now!)</a>	AdvantageERx: IdenTrust Registration	★ Republished: 3/29/2024 - Review the IdenTrust Registration Process.	10
ADERX_255 <a href="#">(Take Course Now!)</a>	AdvantageERx: Table Setup Overview	Published: 9/17/2021 -Administrative set up for AdvantageERx. Includes: Login Tables, Location Details, Provider and E-Rx Provider Tables, Test environment and Server Test Command.	19
ADERX_275 <a href="#">(Take Course Now!)</a>	AdvantageERx: EPCS - Controlled Substances	Republished: 8/11/2022 - Review provider registration & vetting, digitally signing with two-factor authentication, refill controls and more	12

<p>ADERX_280</p> <p><a href="#">(Take Course Now!)</a></p>	<p>AdvantageERx: How To Disable EPCS</p>	<p>Published: 10/8/2021 - Learn what to do if a Provider's EPCS credentials are compromised.</p>	<p>7</p>
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**Functionality**

65

Course ID	Course Name	Course Description	Minutes
<p>ADERX_260</p> <p><a href="#">(Take Course Now!)</a></p>	<p>AdvantageERx: E-Prescribing Workflow</p>	<p>Republished: 2/29/2024 - Workflow for Prescribers and Staff assisting with e-Prescribing medications. Includes: ERx History, Plan Eligibility, Standard Medication, Formulary Section, Screen, Review, Transmit Rx, EPA and Canceling the Prescription.</p>	<p>22</p>
<p>ADERX_295</p> <p><a href="#">(Take Course Now!)</a></p>	<p>AdvantageERx: EPCS Mobile Authentication Solution</p>	<p>★ Published: 3/15/2024 - This course reviews the new Soft Key EPCS Prescribing Mobile Authentication solution.</p>	<p>6</p>
<p>ADERX_265</p> <p><a href="#">(Take Course Now!)</a></p>	<p>AdvantageERx: Tools</p>	<p>Republished: 8/11/2022 - Reviews: Pharmacy Search window Edit, Sign, Change, Education, Refresh, Utility, Refill, eRx Worklists, Patient Connect, Reports and AdvantageERx Dashboard.</p>	<p>20</p>

<p>ADERX_285</p> <p><a href="#">(Take Course Now!)</a></p>	<p>AdvantageERx: Electronic Prior Authorization</p>	<p>Republished: 8/11/2022 - Review the EPA workflow with automated and on-demand authorization requests</p>	<p>11</p>
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<p>ADERX_290</p> <p><a href="#">(Take Course Now!)</a></p>	<p>AdvantageERx: Prescription Drug Monitoring Program (PDMP)</p>	<p>Republished: 3/10/2023 - Review the Prescription Drug Monitoring Program (PDMP) set up and functionality.</p>	<p>6</p>
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## Functions

*Total Minutes* **44**

## Appointments

*10*

Course ID	Course Name	Course Description	Minutes
<p>FUNC_310</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Appointment Communication Function</p>	<p>Published: 6/7/2022 - Learn how to generate personalized appointment communications via a batch process using letter, post cards or E-Mail.</p>	<p>10</p>

## Lockbox Payments

*5*

Course ID	Course Name	Course Description	Minutes
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SDFUNC\_100

[\(Take Course Now!\)](#)

Lockbox Payment Function

Republished: 4/7/2021 - This course covers the optional Lockbox Payment Function which enables you to download Patient responsible payments in a specified format, for automated posting within your Advantage software.

5

## Patient Follow-up/ToDo

12

Course ID	Course Name	Course Description	Minutes
FUNC_315	ToDo Follow-up Function	Published: 9/29/22 - This tutorial explains the options and features of the Patient ToDo/FollowUp Function, including Add Default ToDos.	12

[\(Take Course Now!\)](#)

## Patient Recall

17

Course ID	Course Name	Course Description	Minutes
SDRECALL_100	Recall Setup	Published: 8/13/2020 - We will briefly review what setup is required in order to use Patient Recall in your Advantage software.	4
FUNC_215_2	Patient Recall	Published: 8/13/2020 - We will explain all of the option settings and demonstrate how to utilize this function to create Recall Notices for your patients in a number of different ways.	13

[\(Take Course Now!\)](#)

[\(Take Course Now!\)](#)

## Govt Compliance

Total Minutes **185**

### Appropriate Use Criteria

9

Course ID	Course Name	Course Description	Minutes
AUC_100 <a href="#">(Take Course Now!)</a>	AUC: Table Setup And Exam Functionality	Published: 4/21/2023 - Learn what table setup is required for Appropriate Use Criteria and how AUC functions in the exam screens.	9

### No Surprises Act

68

Course ID	Course Name	Course Description	Minutes
NSA_100 <a href="#">(Take Course Now!)</a>	Navigating the No Surprises Act Practical Approach	Published: 1/13/2021 - An overview of the No Surprises Act which took affect 1/1/2022 by Karen Perry, OD FAAO - Director of Professional Relations.	62
SDNSA_100 <a href="#">(Take Course Now!)</a>	No Surprises Act (NSA) Documents	Published: 3/31/2022 - Briefly review documents Compulink has provided to assist your practice in complying with the No Surprises Act.	6

### QPP MACRA/MIPS

108

Course ID	Course Name	Course Description	Minutes
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<p>QPP_615</p> <p><a href="#">(Take Course Now!)</a></p>	<p>MACRA: 2024 PY Changes</p>	<p>Published: 2/29/2024 - Review changes to the MACRA program for the 2024 Performance Year.</p>	<p>10</p>
<p>QPP_605</p> <p><a href="#">(Take Course Now!)</a></p>	<p>MACRA: 2023 PY Changes</p>	<p>Published: 6/27/2023 - Here's an overview of changes to the MACRA program for the 2023 performance year.</p>	<p>11</p>
<p>SDQ_460</p> <p><a href="#">(Take Course Now!)</a></p>	<p>CMS MIPS Quick Start Guides</p>	<p>Republished: 2/15/2024 - Learn how to quickly access the CMS Quick Start Guides for each performance category. Use the Measures Tool to identify measures relevant to your practice.</p>	<p>3</p>
<p>QPP_610</p> <p><a href="#">(Take Course Now!)</a></p>	<p>2024 Medicare Part B Claim Submission of Quality Measures</p>	<p>Published: 1/15/2024 - This course is designed for users submitting Quality Measures through Medicare Part B claims. Learn how the Exam Quality tab connects to your Financial Services table and how to add/update Quality Codes for the current year. Length:</p>	<p>10</p>
<p>SDQ_455</p> <p><a href="#">(Take Course Now!)</a></p>	<p>MACRA: QPP Submission Portal Resources</p>	<p>Republished: 1/15/2024 - Briefly review where you go to submit data on the QPP Submission Portal. Length: 2 Minutes</p>	<p>2</p>

<p>QPP_580</p> <p><a href="#">(Take Course Now!)</a></p>	<p>2023 PI e-Prescribing Objective</p>	<p>Published: 6/27/2023 - Review the measures within the e-Prescribing objective and learn which data points in your Advantage software are documented to meet the specifications.</p>	<p>8</p>
<p>QPP_595</p> <p><a href="#">(Take Course Now!)</a></p>	<p>2023 PI Public Health &amp; Clinical Data Exchange Objective</p>	<p>Published: 6/27/2023 - Review the measures within the Public Health and Clinical Data Exchange objective. Navigate to the Registries &amp; HIE Interface Request page on the Compulink Client Web Portal.</p>	<p>16</p>
<p>QPP_590</p> <p><a href="#">(Take Course Now!)</a></p>	<p>2024 Promoting Interoperability Provider To Patient Exchange</p>	<p>★ Published: 4/12/2024 - Review the measures within the Provider to Patient Exchange objective and learn which data points in your Advantage software are documented to meet the specifications.</p>	<p>8</p>
<p>QPP_600</p> <p><a href="#">(Take Course Now!)</a></p>	<p>PI: Protect Patient Health Information Objective</p>	<p>★ Published: 4/15/2024 - Review the Security Risk Analysis measure within the Protect Patient Health Information objective. Learn which measure specifications relate to your Advantage software.</p>	<p>16</p>
<p>QPP_620</p> <p><a href="#">(Take Course Now!)</a></p>	<p>PI: E-Prescribing Objective</p>	<p>★ Published: 4/15/2024 - Review the measures within the E-Prescribing objective and learn which data points in your Advantage software are documented to meet the specifications.</p>	<p>8</p>

QPP\_625

[\(Take Course Now!\)](#)

PI: Public Health Objective

★ Published: Review the measures within the Public Health and Clinical Data Exchange objective. Navigate to the Registries & HIE Interface Request page on the Compulink Client Web Portal.

16

## Group Scheduling

*Total Minutes* **17**

### Admin/Setup

7

Course ID	Course Name	Course Description	Minutes
GRP_110_PV <a href="#">(Take Course Now!)</a>	Group Scheduling Setup	Published: 7/2/2021 - Reviews the Group Table Setup for Group Scheduling.	7

### Functionality

10

Course ID	Course Name	Course Description	Minutes
GRP_115_PV <a href="#">(Take Course Now!)</a>	Group Scheduling Workflow	Published: 7/2/2021 - Reviews the Workflow of Group Scheduling.	10

## Inventory

*Total Minutes* **91**

### Admin/Setup

53

Course ID	Course Name	Course Description	Minutes
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ITAB_115_2 <a href="#">(Take Course Now!)</a>	Inventory Tables	Published: 7/14/2023 - This course reviews the Inventory tables including Adjustments, Order Comments, SKU Formulas, Vendors and more.	12
INV_402_2 <a href="#">(Take Course Now!)</a>	Inventory: Preparing For An Audit	Republished: 5/30/2023 - This course provides the recommended steps to prepare for a successful audit.	8
INV_500_2 <a href="#">(Take Course Now!)</a>	Admin Information For Inventory Functions	Published: 6/27/2022 - This course reviews Inventory Functionality, related reports, peripheral options and specific component details. Length: 9 Minutes	33

**Functions** 23

Course ID	Course Name	Course Description	Minutes
INV_535_2 <a href="#">(Take Course Now!)</a>	Inventory: Audit	Published: 7/20/2022 - This course reviews running the Audit Function and reviewing the Inventory Discrepancy Report.	8

<p>INV_525_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Inventory: Batch Adjustments</p>	<p>Published: 8/5/2022 - This course reviews running the Batch Adjustments Function.</p>	<p>4</p>
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<p>INV_520_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Inventory: Place and Receive Orders</p>	<p>Published: 10/19/22 - This course reviews the functionality of the Place &amp; Receive Orders Functions.</p>	<p>11</p>
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<b>Reports</b>	<i>15</i>
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Course ID	Course Name	Course Description	Minutes
<p>INV_540_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Inventory Reports</p>	<p>Published: 10/19/2022 - This course reviews the Inventory reports and their parameters.</p>	<p>15</p>

<b>Ledger</b>	<i>Total Minutes</i> <b>342</b>
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<b>Commands</b>	<i>123</i>
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Course ID	Course Name	Course Description	Minutes
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<p>LEDG_690 <a href="#">(Take Course Now!)</a></p>	<p>Ledger: Options Commands V12.7+</p>	<p>Published: 5/30/2023 - Learn the functionality of each item on the Ledger Options command menu.</p>	<p>30</p>
<p>LEDG_675 <a href="#">(Take Course Now!)</a></p>	<p>Ledger: Options Commands</p>	<p>Published: 3/18/2022 - All of the commands under the Options menu in the patient ledger will be shown and demonstrated in this course.</p>	<p>32</p>
<p>LEDG_685 <a href="#">(Take Course Now!)</a></p>	<p>Ledger: Alternate Receipt Options</p>	<p>Republished: 12/15/2023 - Review the alternate receipt options found under the Ledger &gt; Print command and learn how to change the default receipt.</p>	<p>17</p>
<p>LEDG_490 <a href="#">(Take Course Now!)</a></p>	<p>Ledger: Print &gt; Report Alternate Receipt Options</p>	<p>Published: 7/2/2020 - This course reviews the alternate receipt options that are found under the Ledger &gt; Print command, and provides instructions for how to change the default receipt.</p>	<p>18</p>
<p>LEDG_695 <a href="#">(Take Course Now!)</a></p>	<p>Ledger: View Commands V12.7 +</p>	<p>Published: 5/30/2023 - Learn the function of each option on the Ledger View command menu.</p>	<p>16</p>

LEDG_575 <a href="#">(Take Course Now!)</a>	Ledger: View Commands	Published: 7/7/2022 - Each of the commands on the Ledger > View menu will be explained and demonstrated in this course.	10
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## Ledger Posting

178

Course ID	Course Name	Course Description	Minutes
LEDG_700 <a href="#">(Take Course Now!)</a>	Ledger: Posting Charges I V12.7 +	Published: 5/30/2023 - Take a deep dive into the Ledger charge posting screen.	20
LEDG_630 <a href="#">(Take Course Now!)</a>	Ledger: Posting Charges I	Published: 11/19/2021 - Take a deep dive into the Add/Edit/Insert Charge Posting window. Understanding how to complete this screen is key to accurate ledger posting.	25
LEDG_705 <a href="#">(Take Course Now!)</a>	Ledger: Posting Charges II V12.7 +	Published: 5/30/2023 - Learn how to post a Service, Material or X-ray charge to your patient ledgers.	16

LEDG_635 <a href="#">(Take Course Now!)</a>	Ledger: Posting Charges II	Republished: 8/30/2022 - Learn how to post a Service, Material or X-ray charge to your patient ledgers.	17
SDL_190 <a href="#">(Take Course Now!)</a>	Ledger Posting From EHR	Republished: 2/29/2024 - Walk through the steps of posting charges to a patient ledger from the EHR.	2
LEDG_730 <a href="#">(Take Course Now!)</a>	Patient Co-Pay Functionality	Published: 7/28/2023 - Review how to set a per-visit Co-Pay and explore options for collecting and applying Co-Pay payments.	7
SDL_175 <a href="#">(Take Course Now!)</a>	Advance Payments	Published: 8/12/2021 - Learn how to accept Prepayments without having Unapplied payments in your patient ledgers.	4
LEDG_650 <a href="#">(Take Course Now!)</a>	Ledger: Prepayments and Unapplied Payments	Republished: 8/15/2023 - Learn how to post Prepayments and distribute Unapplied Payments in your patient ledgers.	8

LEDG_640 <a href="#">(Take Course Now!)</a>	Ledger: Posting Responsible Payments	Republished: 7/28/2023 - Learn about each of the Credit > Responsible commands for posting patient/responsible payments to the ledger.	12
LEDG_645 <a href="#">(Take Course Now!)</a>	Ledger: Posting Insurance Payments	Republished: 8/15/2023 - Walk through different scenarios for posting incoming insurance payments, including how to handle \$0.00 EOBs.	18
SDL_200 <a href="#">(Take Course Now!)</a>	Posting Payment Transfers	Republished: 12/2/2022 - Walk through how to transfer payments, both within the same ledger account or to other patient accounts.	5
LEDG_720 <a href="#">(Take Course Now!)</a>	Ledger: Posting Adjustments	Published: 7/28/2023 - Learn how to post various ledger adjustments using the Adjust or Create Unapplied Payments commands. This includes how to handle overpayments and \$0.00 adjustments.	16
LEDG_665 <a href="#">(Take Course Now!)</a>	Ledger: Posting Refunds	Republished: 8/15/2023 - Learn how to post insurance and account responsible refunds as well as how to properly use the Void Entry and Return commands.	19

LEDG_655 <a href="#">(Take Course Now!)</a>	Ledger: Batch Posting	Republished: 11/15/2023 - Learn how the Batch Posting feature works for posting charges and payments in a batch format in your patient ledgers.	8
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SDL_215 <a href="#">(Take Course Now!)</a>	Ledger: Batch Worklist	Published: 6/17/2022 - The Ledger Batch Worklist is an efficiency tool for batch posting of EOBs across multiple patient ledgers.	1
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**Collection Accounts** 21

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Course ID	Course Name	Course Description	Minutes
LEDG_735 <a href="#">(Take Course Now!)</a>	Ledger: Collection Setup	Published: 8/15/2023 - Learn what setup is required to support the Collection Tracking module in patient ledgers.	12
LEDG_605 <a href="#">(Take Course Now!)</a>	Ledger: Collection Accounts	Republished: 11/15/2023 - Explore the Ledger Collection module with efficiency tools designed to manage your overdue patient accounts.	9

**Standard vs Line Item Accounting** 20

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Course ID	Course Name	Course Description	Minutes
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SDL_180 <a href="#">(Take Course Now!)</a>	Benefits of Line Item Posting	Published: 4/7/2022 - Learn about the benefits of our Line Item Accounting feature and review differences between standard and LIP ledgers.	4
LEDG_580 <a href="#">(Take Course Now!)</a>	Updating To Line Item Posting Ledgers	Republished: 9/29/2023 - This course is essential for anyone planning to upgrade from Standard to Line Item Posting. It outlines the steps of the update process, reviews the benefits of upgrading and explains the differences between Standard and LIP ledge	16

## Patient Flow

*Total Minutes* **201**

### Patient Accounts

72

Course ID	Course Name	Course Description	Minutes
PAT_400 <a href="#">(Take Course Now!)</a>	Adding a New Patient	Republished: 2/13/2023 - This course covers how to add new patient and account responsible information, add a patient's picture to their record, scan in an insurance card and scan in a HIPAA agreement.	12
PAT_415 <a href="#">(Take Course Now!)</a>	Adding a Patient Contact	Republished: 11/29/2023 - Review the Patient Contact screen, its purpose and definitions of all field options.	8



SDPAT_140 <a href="#">(Take Course Now!)</a>	Adding a Patient Picture	Republished: 2/29/2024 - This course will demonstrate how to setup the digital web camera for Patient photos and how to add a photo to the Patient record.	3
PAT_260_2 <a href="#">(Take Course Now!)</a>	Patient Referrals: Authorizations or Tracking Visits	Republished: 12/2/2022 - Learn how to add referral records used to track insurance authorizations, including how to use the visit tracker to monitor visits incurred.	9
PAT_265_2 <a href="#">(Take Course Now!)</a>	Referrals: Patient to Patient and Advertising	Published: 9/17/2021 - Walk through examples of adding patient referrals for the purpose of tracking advertising or marketing venues and adding referrals for existing patients referring new patients to the office.	6
PAT_270_2 <a href="#">(Take Course Now!)</a>	Adding Patient Referrals for Incoming or Outgoing V12.3/Greater	Republished: 12/2/2022 - You will learn how to add and complete referral source screens for incoming and outgoing provider referrals, including references to requirements for meeting MIPS HIE measures in this course.	10
PAT_420 <a href="#">(Take Course Now!)</a>	Adding Patient Insurance	Published: 7/28/2023 - Learn how to add an insurance record with patient and insured information.	17

PAT_285 <a href="#">(Take Course Now!)</a>	Adding Patient ToDos	Republished: 12/15/2023 - This course explains how to access, add and mark ToDos items complete on your patient accounts.	7
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## Functionality

62

Course ID	Course Name	Course Description	Minutes
SDPAT_190_2 <a href="#">(Take Course Now!)</a>	Introduction to Worklists	Published: 1/31/2024 - Briefly review how Worklists can be used to assist with your daily tasks.	5
SDPM_210 <a href="#">(Take Course Now!)</a>	Patient Search Options	Republished: 2/29/2024 - This short course provides an overview of the Search window and all of its enhanced features.	5
PAT_425 <a href="#">(Take Course Now!)</a>	Checking in a New Patient	Published: 8/15/2023 - Review the steps for checking in a patient including marking their appointment Kept, scanning their insurance card and HIPAA agreement as well as collecting a co-pay. Print a Patient Information sheet to verify their data is current	12

PAT_430 <a href="#">(Take Course Now!)</a>	Scanning in Advantage	Published 08/31/2023 This course reviews scanning documents in the Patient Demographics, Insurance and Exam.	14
PAT_300 <a href="#">(Take Course Now!)</a>	Patient Print Command	★ Republished: 4/30/2024 - Learn about the various print options available within Patient Demographics.	14
PAT_305 <a href="#">(Take Course Now!)</a>	Document Creation Window	Published: 12/4/2020 - The Document Creation window course teaches attendees multiple ways to create documents, including: Type, Recipient and Method.	8
SDRECALL_105 <a href="#">(Take Course Now!)</a>	Patient Recall	Published: 8/13/2020 - This is a brief review of how to set and update Recall notices on your patient files.	4

**Smart Practice**

25

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Course ID	Course Name	Course Description	Minutes
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<p>SMART_110_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>SMART Workflow Setup</p>	<p>Published: 1/10/2023 - Learn how to track patients through your office utilizing SMART Workflow.</p>	<p>16</p>
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<p>SMART_105_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>SMART Workflow Tracking</p>	<p>Republished: 12/2/2022 - This course demonstrates the functionality for how to track patients through your office utilizing SMART Workflow.</p>	<p>9</p>
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**Task Management** 29

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<b>Course ID</b>	<b>Course Name</b>	<b>Course Description</b>	<b>Minutes</b>
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<p>PAT_435</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Task Management Setup</p>	<p>Published: 12/15/2023 - Learn about the tables supporting the Enterprise Task Management feature. Includes the purpose of each table and how to build entries.</p>	<p>11</p>
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<p>PAT_440</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Enterprise Task Management</p>	<p>Published: 12/15/2023 - Learn about the Enterprise Task Management feature.</p>	<p>11</p>
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PAT_445 <a href="#">(Take Course Now!)</a>	Task Loc & Staff Group Assignment Control	Published: 12/15/2023 - Learn about the Location and Staff Group Assignment controls related to the Task Management feature.	7
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## Episode of Care

13

Course ID	Course Name	Course Description	Minutes
PAT_355_OZ <a href="#">(Take Course Now!)</a>	Episodes Of Care	Published: 12/22/2023 - Review the benefits, proper setup and functionality of Episodes of Care.	10
PAT_450 <a href="#">(Take Course Now!)</a>	Intro to Episodes of Care	Published: 10/31/2023 - Briefly review the setup required to utilize the Episodes of Care feature.	3

## Patient Portal

Total Minutes **26**

### Functionality

3

Course ID	Course Name	Course Description	Minutes
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SDPAT_165 <a href="#">(Take Course Now!)</a>	Portal: Statements & Patient Payments	Republished: 2/15/2024 - Review how to send a statement to the Patient Portal and see how online payments made on the Portal get automatically posted to the ledgers in Advantage.	3
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## Portal Communication

10

Course ID	Course Name	Course Description	Minutes
SDPP_110 <a href="#">(Take Course Now!)</a>	Reset Portal Accounts & Resend CCD Process	Published: 2/24/2023 - Briefly review the process for resetting a patient's portal account and resending a CCD.	2
FUNC_305 <a href="#">(Take Course Now!)</a>	Portal Communications Function	Republished: 5/19/2022 - Learn how to run the function, what processes are working in the background and see where incoming messages from the Patient Portal are recorded.	8

## Patient Education

13

Course ID	Course Name	Course Description	Minutes
SDPAT_145 <a href="#">(Take Course Now!)</a>	Portal: Patient Education Resources	Republished: 6/26/2023 - Learn about the videos and online Help available to your patients on the MySecureHealthData sign in page.	2

SDPAT_175 <a href="#">(Take Course Now!)</a>	Patient Portal Updates	Republished: 8/15/2023 - Review the latest updates made to the Patient Portal that coincide with the release of V12.7.0.24/greater.	3
SDPAT_125 <a href="#">(Take Course Now!)</a>	Portal: Registration And Logging In	Republished: 6/16/2023 - This short video will explain the step by step process for how to register and validate a patient account on the portal, from the patient's perspective.	2
SDPAT_130 <a href="#">(Take Course Now!)</a>	Portal: Access Your Health Information	Republished: 6/16/2023 - Learn how to access and view health information your provider has uploaded to your Patient Portal.	2
SDPAT_135 <a href="#">(Take Course Now!)</a>	Portal: Message Your Provider	Republished: 6/16/2023 - Learn how to message your provider from within the Patient Portal.	1
SDPAT_160 <a href="#">(Take Course Now!)</a>	Portal: Online Statements & Payments	Published: 6/16/2023 - Learn how to view your statement and make a payment to your provider's office on the Patient Portal.	2

SDPAT_170 <a href="#">(Take Course Now!)</a>	Portal: View Appointments	Published: 6/16/2023 - Quickly view your upcoming and past appointments on the Patient Portal.	1
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## Practice Admin

*Total Minutes* **50**

### Features & Efficiencies

*50*

Course ID	Course Name	Course Description	Minutes
SDPM_215 <a href="#">(Take Course Now!)</a>	Integrated Payment Processing	Published: 9/14/2023 - Learn about the benefits and workflow of integrated payment processing within your Advantage software.	5
ACCT_100 <a href="#">(Take Course Now!)</a>	Accounting Interfaces	Republished: 1/10/2023 - Review the available options for interfacing your 3rd party accounting software with Advantage and walk through an overview of the setup process.	11
SDPAT_180 <a href="#">(Take Course Now!)</a>	Logging In to Your Advantage Software	Published: 9/29/2023 - Learn how to log in to your Advantage software.	3



<p>FUNC_300</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Function: Time Clock Review/Maintenance</p>	<p>★ Republished: 3/15/2024 - This course provides an overview of the Time Clock History Function for administrators and managers.</p>	<p>7</p>
<p>SDPAT_185</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Utilizing the Time Clock</p>	<p>Published: 10/12/2023 - Learn how to clock in and out, utilizing the Time Clock feature within Advantage.</p>	<p>5</p>
<p>SDWP_100</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Configuring Your Default Word Processor</p>	<p>Republished: 5/19/2022 - This course briefly explains the options for word processing interfaces and provides instructions for where and how to set the default word processor for your system.</p>	<p>2</p>
<p>PAT_280</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Scanner Overview and Setup</p>	<p>Published: 6/7/2022 - This course reviews how to set up a scanner with the Advantage software.</p>	<p>11</p>
<p>SDPM_200</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Signature Update</p>	<p>Republished: 2/15/2024 - Learn how to save an Electronic Signature for use when generating signed documents.</p>	<p>3</p>

SDPAT_150 <a href="#">(Take Course Now!)</a>	Touch Screen & Tablet Functionality	Published: 10/19/2021 - Review special functionality available for Touch Screen monitors and Tablets	3
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## PracticeWatch

Total Minutes **93**

### Admin/Setup

25

Course ID	Course Name	Course Description	Minutes
PW_200 <a href="#">(Take Course Now!)</a>	PracticeWatch: Installation	Published: 9/14/2023 - This course reviews the required administrative rights and installation process for the PracticeWatch service.	9
PW_205 <a href="#">(Take Course Now!)</a>	PracticeWatch: General Overview	Published: 10/13/2023 - This course reviews the table commands, panel details and menu options in the PracticeWatch Dashboard.	16

### Functionality

68

Course ID	Course Name	Course Description	Minutes
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<p>PW_160</p> <p><a href="#">(Take Course Now!)</a></p>	<p>PracticeWatch: Create a Distribution Group</p>	<p>Published: 2/17/2022 - Review editing, removing, deleting, creating and attaching a Distribution List to a PracticeWatch Task.</p>	<p>10</p>
<p>PW_190</p> <p><a href="#">(Take Course Now!)</a></p>	<p>PracticeWatch: Automating Reports</p>	<p>Published: 3/15/2022 - Review how to setup automated reports and deliver them to staff.</p>	<p>6</p>
<p>PW_185</p> <p><a href="#">(Take Course Now!)</a></p>	<p>PracticeWatch: Automating Patient Eligibility</p>	<p>Published: 10/31/2023 - Briefly review the setup required to utilize the Episodes of Care feature.</p>	<p>3</p>
<p>PW_150</p> <p><a href="#">(Take Course Now!)</a></p>	<p>PracticeWatch: Create an Instant Message Task</p>	<p>Published: 1/15/2024 - Review how to set up automated IMs to staff. Length: 4 Minutes</p>	<p>4</p>
<p>PW_170</p> <p><a href="#">(Take Course Now!)</a></p>	<p>PracticeWatch: Create a Text Message Task</p>	<p>Published: 3/15/2022 - Review how to setup Text Messages to patients and staff with PracticeWatch.</p>	<p>7</p>

PW_155 <a href="#">(Take Course Now!)</a>	PracticeWatch: Create a ToDo Task	Published 2/24/2022 - Learn how to automate your Patient ToDos.	9
PW_165 <a href="#">(Take Course Now!)</a>	PracticeWatch: E-Mailing Patients	Published: 2/24/2022 Set up E-Mailing Patients with PracticeWatch.	8
PW_195 <a href="#">(Take Course Now!)</a>	PracticeWatch: E-Mailing Staff	Published: 2/24/2022 - Set up E-Mailing Staff with PracticeWatch.	8
PW_180 <a href="#">(Take Course Now!)</a>	PracticeWatch: Populate Report Data for the Quality Payment	Published: 3/15/2022 - Review how to automate populating the Quality Report Data with PracticeWatch. Includes adding and scheduling a Promoting Interoperability (PI) Report.	13

## Reports: Financial

Total Minutes **168**

### Prerequisite for Report Courses

15

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Course ID	Course Name	Course Description	Minutes
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REP_100 <a href="#">(Take Course Now!)</a>	Introduction to Reports	★ Republished: 3/15/2024 - Learn the basics about Crystal Reports: User Access, Parameter/ Value options, Toolbar Options, Drill Down Feature and more. This course is a prerequisite to the individual report courses.	15
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## Analysis 145

Course ID	Course Name	Course Description	Minutes
RPT_FANA_111 <a href="#">(Take Course Now!)</a>	ASC Case Cost Materials DOS Report	Published: 9/30/2021 - Track the material costs associated with your ASC procedures using this new report. Learn how to provide input during the report BETA period.	6
RPT_FANA_110_2 <a href="#">(Take Course Now!)</a>	AdvantageRCM Fee Calculation Report	Published: 10/1/2021 - Learn how this report identifies RCM eligible payments that are used to determine your monthly RCM fees.	7
RPT_FANA_130_2 <a href="#">(Take Course Now!)</a>	Financial Analysis Rpts: Charge Collection Analysis/by Patient	Published: 10/9/2020 - This course reviews and compares the Charge Collection Analysis report with it's companion report, the Charge Collection by Patient report.	12

RPT\_FANA\_115

[\(Take Course Now!\)](#)

### Audit Trail Report

Published: 4/9/2021 - The Audit Trail Report lists edits, deletions and additions to the Ledger.

6

RPT\_FANA\_105

[\(Take Course Now!\)](#)

### BETA Production by Primary Payor Report

Published: 9/30/2021 - This report evaluates charges by Primary Payor with payments, adjustments, transfers and refunds applied. Learn how to provide input during the report BETA period.

5

RPT\_FANA\_135

[\(Take Course Now!\)](#)

### Financial: Collection Performance Report

Published: 2/26/2021 - The Collection Performance Report shows charges by Service date, with all payments and adjustments applied to those charges up to the report date. This report is grouped by Primary Insurance Payor to help you to measure the performance.

8

RPT\_FANA\_140

[\(Take Course Now!\)](#)

### Insurance Adjustment Analysis Report

Published: 6/9/2021 - The Insurance Adjustments Report helps you identify the types of Adjustments being posted for Primary Payors.

7

RPT\_FANA\_150

[\(Take Course Now!\)](#)

### Non LIP Office Production Report

Published: 2/4/2021 - This report is designed for practices posting ledger transactions in the Standard, Non Line Item Posting (LIP) environment. The Non LIP Office Production report shows charges, adjustments, payments and refunds posted during the report period.

12

<p>RPT_FANA_155</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Office Production Report</p>	<p>Published: 1/19/2021 - The Office Production shows Charges, Adjustments, Payments and Refunds posted during a specified reporting period. Learn about Transaction Types, statistics by Provider and more.</p>	<p>9</p>
<p>RPT_FANA_145</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Office Production Report with Inline Adjustments</p>	<p>Published: 2/4/2021 - The Office Production with Inline Adjustments Report, shows Charges, Adjustments, Payments and Refunds posted during a specified reporting period. Learn about Transaction Types, statistics by Provider and more.</p>	<p>13</p>
<p>RPT_FANA_160</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Payments By CPT Report</p>	<p>Published: 2/17/2021 - The Payments by CPT report analyzes payments posted during a specified date range.Charges with payment activity are grouped by Transaction Type (Services, Materials/Miscellaneous) and by Category, based on Category Codes assigned i</p>	<p>7</p>
<p>RPT_FANA_100</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Payments by Payor Report</p>	<p>Published: 12/31/2021 - The Payments By Payor Report enables you to view a summary of payments by a Payor source. Multiple filtering options are available with this report to best suit your needs.</p>	<p>11</p>
<p>RPT_FANA_161</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Payments By Provider Report</p>	<p>Published: 2/17/2021 - The Payments by Provider report analyzes payments taken during a specific date range by the Provider ID assigned to the charges paid. This is an alternative to running the standard Payment Report individually by Provider ID.</p>	<p>6</p>

RPT_FANA_165	Production Analysis Reports	Published: 1/19/2021 - Production Analysis Reports evaluate charges, adjustments, payments and transfers during a specified reporting period. Multiple options to drill-down your Production data are available. These reports are effective in helping you eva	8
<a href="#">(Take Course Now!)</a>			
RPT_FANA_170	Reimbursement Analysis Report	Published: 7/29/2021 - The Reimbursement Analysis report allows you to see how well you are being reimbursed for a particular CPT code or overall.	6
<a href="#">(Take Course Now!)</a>			
RPT_FANA_175	Reimbursement Detail Report	Published: 7/29/2021 - This report provides a view of reimbursements and adjustments at the individual Charge level.	5
<a href="#">(Take Course Now!)</a>			
RPT_FANA_185	Revenue with Flexible Grouping Report	Published: 10/19/2021 - Learn how to customize report views to evaluate your revenue.	10
<a href="#">(Take Course Now!)</a>			
SDRPT_F_100_2	Revenue Opportunity Report	Published: 1/15/2024 - The Revenue Opportunity Report highlights multiple ways your practice can reduce costs and improve efficiency with Compulink's add-on services. Length: 7 Minutes	7
<a href="#">(Take Course Now!)</a>			



## Daily

8

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Course ID	Course Name	Course Description	Minutes
RPT_FD_115_2 <a href="#">(Take Course Now!)</a>	Financial: Daily Payment Report	Published: 10/23/2021 - The Financial: Daily Payment Report course teaches Users how to Generate the Daily Payment Report, Reconcile methods of Payments, Audit User entries, Payment breakdown by Provider, Creating a Deposit Slip	8

## System Admin

*Total Minutes* **145**

### Dictionary Utilities

24

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Course ID	Course Name	Course Description	Minutes
PM_700 <a href="#">(Take Course Now!)</a>	Dictionary Utilities	Published 08/31/2023 This course reviews the System Administrator Dictionary Utilities including Table Maintenance, Reindex & Recalculating.	18
SA_120 <a href="#">(Take Course Now!)</a>	PHI Export Utilities	Republished: 2/15/2024 - Two new PHI Export utilities were added for compliance with the 21st Century Cures Electronic Health Information Export certification criteria.	6

## License/Software

6

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Course ID	Course Name	Course Description	Minutes
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SDHT_130 <a href="#">(Take Course Now!)</a>	How to Update your Advantage Software	★ Republished: 3/11/2024 - Server Based Clients will learn how to update their Advantage Software in this course.	6
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**Login** 52

Course ID	Course Name	Course Description	Minutes
SATAB_110 <a href="#">(Take Course Now!)</a>	Login IDs Table	Published: 6/16/2023 - Learn how to create User Login IDs for your staff. This course reviews each of the data entry fields within this table.	23
SATAB_115 <a href="#">(Take Course Now!)</a>	Login Profiles Table	Republished: 1/15/2024 - Review the purpose and maintenance of the Login Profiles Table. Version 12.7+. Length: 8 Minutes	8
SDSATAB_105 <a href="#">(Take Course Now!)</a>	Login Profile Rights	Republished: 6/16/2023 - This course reviews the importance of correctly assigning staff permission in your Login Profiles. It also outlines tips for success to help you get started.	3

PM_705 <a href="#">(Take Course Now!)</a>	User Lock-Out And Password Management	Published: 5/30/2023 - Discover how passwords can be reset, both on-demand options and automated. Learn about User Lock-Out options and how to deactivate User accounts.	9
SDSATAB_110 <a href="#">(Take Course Now!)</a>	Table Edit Controls	Republished: 6/16/2023 - Review the Table Edit Controls where your system administrator can configure user access at the individual field level.	2
SDSATAB_115 <a href="#">(Take Course Now!)</a>	Opting In or Out of Compulink Communications	★ Published: 4/30/2024 - Review the settings in your Advantage software that determine who receives Compulink Communications.	2
SDPM_170 <a href="#">(Take Course Now!)</a>	Multiple WAN Location Login and Setup Details	Published: 8/20/2021 - To seamlessly transition to multiple Locations within the software, there are detailed steps to complete prior to use.	5

## System Setup/Configuration V12.7+

63

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Course ID	Course Name	Course Description	Minutes
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<p>SDSA_100</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Overview: System Administrator Utilities V12.7+</p>	<p>Republished: 2/15/2024 - Review the utilities located under the System Administrator menu in V12.7/greater.</p>	<p>5</p>
<p>PM_640</p> <p><a href="#">(Take Course Now!)</a></p>	<p>System Setup: Acct. Billing/Statements</p>	<p>Republished: 2/15/2024 - Review how to send a statement to the Patient Portal and see how online payments made on the Portal get automatically posted to the ledgers in Advantage.</p>	<p>12</p>
<p>PM_643</p> <p><a href="#">(Take Course Now!)</a></p>	<p>System Setup: AP/GL</p>	<p>Published: 5/10/2023 - Review the utilities located under the System Administrator menu in V12.7/greater.</p>	<p>4</p>
<p>PM_646</p> <p><a href="#">(Take Course Now!)</a></p>	<p>System Setup: Appointment</p>	<p>Published: 5/10/2023 - Learn about the Appointment Scheduler configuration options in V12.7/greater.</p>	<p>6</p>
<p>PM_652</p> <p><a href="#">(Take Course Now!)</a></p>	<p>System Setup: Deductible Sieve</p>	<p>Published: 5/10/2023 - Learn about Deductible Sieve parameters that may be used to hold claims based on the patient's unmet deductible amount in V12.7/greater.</p>	<p>3</p>

PM_661 <a href="#">(Take Course Now!)</a>	System Setup: Fax Setup	Published: 5/10/2023 - Review the setup required to send/receive electronic faxes with your Advantage software using Updox in V12.7/greater.	4
PM_664 <a href="#">(Take Course Now!)</a>	System Setup: Inventory	Published: 5/10/2023 - Set defaults to control sales tax posting and billing and the display of inventory cost in V12.7/greater.	2
PM_667 <a href="#">(Take Course Now!)</a>	System Setup: Ledger	Published: 5/10/2023 - Configure Account Ledger settings for batch posting, claim validation, diagnosis, post dating, 'stop on' fields and more in V12.7/greater.	4
PM_670 <a href="#">(Take Course Now!)</a>	System Setup: Miscellaneous	Published: 5/10/2023 - Set defaults for customizing data entry and assigning security controls to different areas of your patient records.	6
PM_673 <a href="#">(Take Course Now!)</a>	System Setup: New Patient Defaults	Published: 5/10/2023 - Learn about default values that can be applied to all new patient accounts when created.	3

PM_676_OZ <a href="#">(Take Course Now!)</a>	System Setup: Ophthalmic	Published: 5/10/2023 - Set defaults for Ophthalmic items such as Blank Calculation, Positive Cylinder and Account numbers in V12.7/greater.	2
PM_682 <a href="#">(Take Course Now!)</a>	System Setup: Recall	Published: 5/10/2023 - Set defaults for patient Recall such as Reminder to schedule and ignoring patients with future Appointments in V12.7/greater.	2
PM_685 <a href="#">(Take Course Now!)</a>	System Setup: Security/Access	Published: 5/10/2023 - The Security/Access area is used to establish practice rules related to User Passwords and System Audits in V12.7/greater.	7
PM_688 <a href="#">(Take Course Now!)</a>	System Setup: To Do Add Defaults	Published: 5/10/2023 - Learn to assign action items or reminders to perform tasks related to every new patient added in V12.7/greater.	3

## Tables: Financial

Total Minutes **200**

### AP/GL

12

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Course ID	Course Name	Course Description	Minutes
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FTAB_185 <a href="#">(Take Course Now!)</a>	Financial: G/L And AP Tables	☆ Republished: 5/15/2024 - This course reviews the following financial tables under the G/L and AP menu: Chart of Accounts, Mapping Table, GL Interface Mapping Table and the AP Interface Mapping Table.	12
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## Patient Ledger

188

Course ID	Course Name	Course Description	Minutes
FTAB_100 <a href="#">(Take Course Now!)</a>	Financial: Adjustments Table	☆ Republished: 4/30/2024 - Review the tables under the Financial > Adjustments menu: Description/Amount and Notes.	8
FTAB_110 <a href="#">(Take Course Now!)</a>	Billing IDs Table	☆ Republished: 4/30/2024 - Learn when entries might be needed in the Billing IDs table, and how to complete the data entry fields.	9
FTAB_105 <a href="#">(Take Course Now!)</a>	Financial: Billing Messages Table	☆ Republished: 4/30/2024 - This table stores custom messages that may be attached to patient statements, when printing from the patient ledger or using the Account Statements Function.	7

<p>FTAB_115</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Financial: Carrier Types Table</p>	<p>★ Republished: 5/15/2024 - This table is used to classify insurance companies for claims /processing. Learn about the Code classification types and how/when to create unique entries based on specific billing requirements.</p>	<p>7</p>
<p>FTAB_425</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Financial: Service Fee Table</p>	<p>★ Republished: 4/30/2024 - Learn how to build and maintain your Financial Services table, which stores all of your billing codes and fees.</p>	<p>19</p>
<p>FTAB_430</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Credit Card Co's/Tender Types Tables</p>	<p>Published: 9/16/2022 - Learn the functionality and maintenance of the Financial Credit Card Co's and Tender Types tables.</p>	<p>6</p>
<p>LEDG_600</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Collection Setup</p>	<p>Published: 8/12/2021 - Learn what setup is required to support the Collection Tracking module in patient ledgers.</p>	<p>6</p>
<p>FTAB_150</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Financial: CPT Code Check Table</p>	<p>★ Republished: 5/15/2024 - This table enables you to verify that a procedure code posted in the Ledger is 'Legal' for the Provider ID/Service Location/Financial Plan/DOS associated with a charge.</p>	<p>7</p>



<p>FTAB_400_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Fees Tables</p>	<p>Published: 3/15/2022 - Learn about the following financial tables under the Fees menu: Category Codes, Posting Groups and Group Rules.</p>	<p>15</p>
<p>FTAB_160</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Electronic Payment Setup Table</p>	<p>Published: 3/20/2023 - Learn how to complete the Electronic Payment Setup table which stores information for processing electronic payments from your patients.</p>	<p>4</p>
<p>FTAB_190</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Financial: Location/Provider Restriction Table</p>	<p>★ Republished: 5/15/2024 - This table is available for practices who want to verify that the correct Service Location and Provider ID combinations are being posted to the ledger.</p>	<p>5</p>
<p>FTAB_215_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Payors Table</p>	<p>Published: 2/25/2021 - This course reviews each of the tables under the Financial &gt; Payors menu, including the Payor &gt; Names Table, Compulink Update feature and the Payors &gt; Groups table.</p>	<p>21</p>
<p>FTAB_410_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Plans Table</p>	<p>Published: 2/24/2022 - The Plan attached to a patient's record controls how charges post to their Ledger. This course covers the setup and functionality of the Financial Plans table, V12.5/greater.</p>	<p>7</p>

<p>FTAB_210</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Financial: Notes Table</p>	<p>★ Republished: 5/15/2024 - Review the Notes table which stores standard notes or comments that you may wish to include on a patient's Ledger.</p>	<p>4</p>
<p>FTAB_320</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Financial: Revenue Codes Table</p>	<p>Republished: 3/20/2023 - Learn how to populate the Revenue Codes table, used to store Revenue Codes associated with Medicare Part A UB04 claims.</p>	<p>3</p>
<p>FTAB_440</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Service Fees Table V12.7+</p>	<p>Published: 8/15/2023 - Learn how to build and maintain your financial Service Fee table, where your billing codes and fees are stored.</p>	<p>20</p>
<p>FTAB_435_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Miscellaneous Fee Table</p>	<p>Published: 11/3/2022 - Review the purpose and maintenance of the Financial Materials table.</p>	<p>18</p>
<p>FTAB_435_OZ</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Material Fee Table</p>	<p>Published: 11/3/2022 - Review the purpose and maintenance of the Financial Materials table.</p>	<p>18</p>

SDFTAB\_100

[\(Take Course Now!\)](#)

Test Command in Fee Tables

Published: 7/2/2020 - This course reviews how to use the Test Command in the Services/Materials Tables to test the expected Ledger Posting results of charges.

4

## Tables: General

Total Minutes **128**

### Admin/Setup

15

Course ID	Course Name	Course Description	Minutes
TAB_900 <a href="#">(Take Course Now!)</a>	Table Commands	★ Republished: 3/15/2024 - Learn about the standard commands found in your Advantage Look-up Tables. This course is a prerequisite to the individual table courses.	12
SDGTAB_105 <a href="#">(Take Course Now!)</a>	General Table Subgroups	Published: 8/26/2022 - Learn how to build a Subgroup of related items in a look-up table.	3

### General Tables

113

Course ID	Course Name	Course Description	Minutes
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SDGTAB\_100  
[\(Take Course Now!\)](#)

## Department Groups

Published: 7/16/2021 - Let's briefly review how practices with Departments configured in their software can use Department Groups.

3

GTAB\_101  
[\(Take Course Now!\)](#)

## Department Tables

Published: 7/16/2021 - Learn the purpose and use of the Department tables and review instructions for how to complete them.

8

GTAB\_111  
[\(Take Course Now!\)](#)

## Facilities Table

Published: 2/18/2021 - Learn about the use and functionality of the Facilities Table.

8

GTAB\_155  
[\(Take Course Now!\)](#)

## Labs Tables

Published: 7/20/2022 - Review the purpose and maintenance of the Medical Labs tables; Labs List and Acct#s, Location Provider Settings.

7

GTAB\_160  
[\(Take Course Now!\)](#)

## Location Tables

Published: 7/20/2022 - This course reviews the Location > Details, Groups and Square Feet tables. We explain the use and functionality of each table and define the data entry fields.

17

<p>GTAB_165</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Patient Tables</p>	<p>Published: 8/18/2022 - Review the purpose and maintenance of the following Patient tables: Lock-Out Reasons, Contact Release, Organization and Role, Confidentiality Type and Communication Type.</p>	<p>11</p>
<p>GTAB_126</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Provider Table</p>	<p>Republished: 9/15/2022 - Review the purpose and maintenance of the Provider table as it relates to medical records, E-Prescribing, billing and financials.</p>	<p>15</p>
<p>GTAB_170</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Recall Tables</p>	<p>Published: 7/20/2022 - Review the purpose and maintenance of the Recall look-up tables; Recall Reason and Recall Periods.</p>	<p>6</p>
<p>GTAB_136_2</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Referral Sources &amp; Reason Tables</p>	<p>Published: 2/26/2021 - This course reviews the Referral Sources and Reason Tables and defines their data entry fields, beginning with V12.4.</p>	<p>16</p>
<p>GTAB_175</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Relationships And Salutations Tables</p>	<p>Published: 8/18/2022 - Review the purpose and maintenance of the Relationship and Salutation tables.</p>	<p>4</p>

GTAB_180 <a href="#">(Take Course Now!)</a>	Scanned Documents Table	Published: 8/18/2022 - Review the purpose and maintenance of the Scanned Document Types table.	4
GTAB_185 <a href="#">(Take Course Now!)</a>	Staff Tables	Published: 8/18/2022 - Review the purpose and maintenance of the Staff > Groups and Staff > Hours tables.	6
GTAB_925 <a href="#">(Take Course Now!)</a>	ToDo Follow-up Tables and Add Defaults	Published: 9/29/22 - Review the purpose and maintenance of the Todo Follow-up tables and learn how Add Defaults function	8

## Telehealth

*Total Minutes* **13**

### Telehealth in Advantage

*13*

Course ID	Course Name	Course Description	Minutes
SDTELE_105 <a href="#">(Take Course Now!)</a>	Remote Video Session Setup	Republished: 1/20/2021 - Here is a brief look at the setup required to utilize Remote Video Session, the Advantage Telehealth video conferencing solution.	5

SDTELE\_110

[\(Take Course Now!\)](#)

The Telehealth Session

Published: 5/27/2020 - Here's a brief look a how to generate a video Telehealth session and the options for documenting a visit in EHR.

8

## Web Reg

*Total Minutes* **49**

### Admin/Setup

7

Course ID	Course Name	Course Description	Minutes
WEB_135 <a href="#">(Take Course Now!)</a>	Web Registration: Setup and Project Steps	Published: 6/7/2022 - Learn how to get started with Web Registration. Includes a function overview, requesting the add-on, project steps and testing recommendations.	7

### Functionality

35

Course ID	Course Name	Course Description	Minutes
WEB_140 <a href="#">(Take Course Now!)</a>	Web Registration: Completing and Importing Data	★ Republished: 3/29/2024 - Review the patient registration process and how to import registration data into your software.	18

WEB_145 <a href="#">(Take Course Now!)</a>	Web Registration: Import Patient Information	★ Published: 3/29/2024 - This course reviews how to import registration data into your Advantage software.	14
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SDWEB_105 <a href="#">(Take Course Now!)</a>	Web Registration: Reprocess a Registration Record	Republished: 6/16/2023 - Learn how to requeue a Patient's Registration Record.	3
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<b>Patient Education</b>	7
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Course ID	Course Name	Course Description	Minutes
SDWEB_115 <a href="#">(Take Course Now!)</a>	Web Registration: Patient Education	Published: 9/15/2022 - Take a look at a new Patient Focused Web Registration Resource, now available on your Web Registration page.	1
SDWEB_110 <a href="#">(Take Course Now!)</a>	How To Complete Your Patient Registration	Republished: 10/19/2022 - This short video walks patients through the Web Registration process.	6

## Word Processing

*Total Minutes* **176**



## Admin/Setup

4

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Course ID	Course Name	Course Description	Minutes
SDOO_100 <a href="#">(Take Course Now!)</a>	OpenOffice Setup	Published: 4/1/2022 - Review how to download and install OpenOffice.	4

10

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Course ID	Course Name	Course Description	Minutes
OO_265 <a href="#">(Take Course Now!)</a>	DMA Electronic Signature Options and Function	Republished: 7/14/2023 - Review the Needs Signature Functionality and options. Includes: Do Not Save Image of Document, E-Fax and Signature Update.	10

## Designing Documents

162

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Course ID	Course Name	Course Description	Minutes
OO_255 <a href="#">(Take Course Now!)</a>	OpenOffice Word Processing Basics	Published: 4/8/2022 - Review duplicating Compulink Owned Letters, adding Logo, accessing the Product Folder </z:textbox>and creating User Owned Letters. Special instructions provided for Cloud Clients.	10

<p>OO_260</p> <p><a href="#">(Take Course Now!)</a></p>	<p>DMA Table Options</p>	<p>Republished: 10/19/2022 - Review how to use the DMA window and how to create a Table with Table Options.</p>	<p>13</p>
<p>SDOO_105</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Letter Customization Tips</p>	<p>Published: 10/27/2022 - This course provides Letter Customization Tips for word processing.</p>	<p>4</p>
<p>OO_220</p> <p><a href="#">(Take Course Now!)</a></p>	<p>Open Office: DMA General Functions</p>	<p>Published: 6/17/2019 - This advanced OpenOffice course reviews all functions available in the DMA, including additional general Field and Table functionalities.</p>	<p>82</p>
<p>OO_270</p> <p><a href="#">(Take Course Now!)</a></p>	<p>DMA General Functions I</p>	<p>Published: 11/3/2022 - This is part one of two courses reviewing the General Functions in the Data Merge Assist.</p>	<p>14</p>
<p>OO_275</p> <p><a href="#">(Take Course Now!)</a></p>	<p>DMA General Functions II</p>	<p>Published: 11/22/2022 - This is part two of the DMA General Functions series. Included are the functions IIF through Table Functions.</p>	<p>19</p>

<p>OO_280</p> <p><a href="#">(Take Course Now!)</a></p>	<p>DMA Tools I</p>	<p>Published: 12/21/2022 - This is part one of three of the DMA Tools Functions series. This course covers the IF Value Is option.</p>	<p>7</p>
<p>OO_285</p> <p><a href="#">(Take Course Now!)</a></p>	<p>DMA Tools II</p>	<p>Published: 12/21/2022 - This is part two of three of the DMA Tools Functions series. This course covers Look-up Table Fields, Exam Image and Appointment Field Filters.</p>	<p>6</p>
<p>OO_290</p> <p><a href="#">(Take Course Now!)</a></p>	<p>DMA Tools III</p>	<p>Published: 1/10/2023 - This is part three of three of the DMA Tools Functions series. This course covers Recordselect, Filter and Sort Order.</p>	<p>7</p>