

OfficeMate® Implementation Plan

Welcome to Eyefinity®! We want your new software to launch successfully. To help, we've designed an easy-to-follow implementation plan for your practice. To begin, follow these simple steps for a smooth implementation.

Planning and Preparation

In order to properly implement your software, it's imperative that you have the right tools and the appropriate professional support. The following will help you prepare:

- **Contract with a Microsoft-certified IT Professional.** This will enable you to set up your system for optimal use of OfficeMate®. Need an IT professional? Contact our Certified Partners, **Think Smart** or **North Shore**.
- **Review the Hardware and System Requirements.** OfficeMate software requires a specific setup in order to optimize performance. Be sure to work with your IT professional to make sure you have the right hardware and system setup in place.
- **Install the OfficeMate Software.** Your IT professional should ensure your system is ready to install. Our team of Customer Support professionals can help with technical issues.
- **Equipment Interfaces** (optional). If you purchased interfaces to work between OfficeMate and your other office equipment, be sure to get the proper information about what your interface will require.
- **Conversion** (optional). If you purchased a conversion from another practice management software program to convert data, complete the **conversion documentation**.

Your success highly depends on proper implementation and training that is essential for your OfficeMate software. For your convenience, we have created various training opportunities. You may review on-demand recordings and attend live courses to learn more about the set up of your software. To aiding this process, we have developed the "Roadmap for Success" to give you a plan of action. Simply follow this plan and set up your system.

The **Implementation Resource Center**, available on demand, offers information to help you through the steps to implementation. Go to **officemate.net**:

1. Click on the **Customer Care** tab.
2. Select **Implementation**.
3. Select **New Client**.
4. Select **Implementation**.

To view recorded video tutorials and enroll in instructor-led online classes available on **officemate.net**, follow the steps below.

Training

Viewing Recorded Tutorials

Recorded video tutorials are available 24x7, and can be viewed as many times as desired. To view the OfficeMate tutorials, go to **officemate.net**:

1. Click on the **Customer Care** tab.
2. Select **Training**.
3. Select **OfficeMate/ExamWRITER®**.
4. Click on the desired tutorials.

Viewing Instructor-led Online Classes

To view the OfficeMate instructor-led online courses, go to **officemate.net**:

1. Click on the **Customer Care** tab.
2. Select **Training**.
3. Select **OfficeMate/ExamWRITER**.
4. Click on **Live WebEx Training Schedule**.

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ROADMAP TO SUCCESS

OfficeMate

		Recorded Tutorials	Live Classes	Software Set Up	
Week 1					
MILESTONE 1	OFFICEMATE OVERVIEW	<input type="checkbox"/> Welcome to Training (8:03)			
		<input type="checkbox"/> Introduction to v10 (25:32)			
		<input type="checkbox"/> Start-to-finish Overview (12:13)			
		<input type="checkbox"/> Navigation and Help (10:33)			
	GET SET	Basic Set Up	<input type="checkbox"/> Location Maintenance and Business Names (7:44)		<input type="checkbox"/> Location maintenance and business names
			<input type="checkbox"/> Resource Set Up (6:20)		<input type="checkbox"/> Resource set up
			<input type="checkbox"/> Role-based Security (7:50)		<input type="checkbox"/> Security
			<input type="checkbox"/> Sales Tax Codes (5:20)		
	GET SET	Appointment Scheduler Set Up	<input type="checkbox"/> Scheduler Preferences (8:24)	<input type="checkbox"/> GS-AS Setting Up the Appointment Scheduler	<input type="checkbox"/> Set up preferences for Scheduler
			<input type="checkbox"/> Services (2:47)		<input type="checkbox"/> Set up services for Scheduler
			<input type="checkbox"/> Office Hours (1:36)		<input type="checkbox"/> Set up office hours for Scheduler
			<input type="checkbox"/> Reminders (4:21)		<input type="checkbox"/> Set up any reminders for Scheduler
			<input type="checkbox"/> Providers and Resources (6:33)		<input type="checkbox"/> Set up providers and resources for Scheduler
			<input type="checkbox"/> Range Set Up and Resource Templates (10:32)		<input type="checkbox"/> Set up Scheduler templates
			<input type="checkbox"/> Appointment Icons (1:55)		<input type="checkbox"/> Set any appointment icons for Scheduler
	Week 2				
	GET SET	Third-Party Set Up	<input type="checkbox"/> Procedure Codes (4:31)	<input type="checkbox"/> GS-AL Attributes and Lens Loader	<input type="checkbox"/> Add/modify procedure codes
			<input type="checkbox"/> Diagnosis Codes (2:54)		<input type="checkbox"/> Add/modify diagnosis codes
<input type="checkbox"/> Modifiers (3:49)				<input type="checkbox"/> Add/modify modifiers	
<input type="checkbox"/> Attributes (20:51)				<input type="checkbox"/> Price attributes	
<input type="checkbox"/> Place of Service (2:33)				<input type="checkbox"/> Add any additional places of service	
Vendor Maint.		<input type="checkbox"/> Power Ranges (2:49)			
		<input type="checkbox"/> Vendor and Location Settings (4:11)		<input type="checkbox"/> Add vendors	
		<input type="checkbox"/> Lab and Lab-locations Settings (8:15)		<input type="checkbox"/> Add information for lab interface	
Weeks 3 and 4					
MILESTONE 2	GET SET	Entering and Maintaining Products and Services	<input type="checkbox"/> Ophthalmic Lenses (15:12)	<input type="checkbox"/> GS-PS Building and Maintaining Your Products and Services Database	<input type="checkbox"/> All products and services entered and priced
			<input type="checkbox"/> Lens Treatments (7:51)		
			<input type="checkbox"/> Frames and Plano Sunglasses (20:27)		
			<input type="checkbox"/> Contact Lenses (8:54)		
			<input type="checkbox"/> Services (12:02)		
			<input type="checkbox"/> Accessories/Other/Ready Readers (6:31)		
		<input type="checkbox"/> Product Maintenance (7:28)			

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Week 5						
GET SET	Insurance Set Up	<input type="checkbox"/> Carrier Tab (8:02)	<input type="checkbox"/> GS-ISU Insurance Set Up	<input type="checkbox"/> Set up insurance carriers and plans		
		<input type="checkbox"/> Plan Tab (9:25)				
	Customization	<input type="checkbox"/> List Box Selections (7:32)		<input type="checkbox"/> Add/modify options for list box selections		
		<input type="checkbox"/> Zip Code Shortcuts (3:26)		<input type="checkbox"/> Add zip code shortcuts		
		<input type="checkbox"/> Service Agreement/Duplication Fees (6:31)		<input type="checkbox"/> Create service agreements/duplication fees		
		<input type="checkbox"/> Marketing (6:11)		<input type="checkbox"/> Create/modify marketing categories		
		<input type="checkbox"/> Recall (11:32)	<input type="checkbox"/> GS-RE Setting Up Recalls	<input type="checkbox"/> Set up recall schedules		
	GET SET	Preferences	<input type="checkbox"/> Maintain Documents (8:51)		<input type="checkbox"/> Create documents for recall and PT use	
			<input type="checkbox"/> Patient (6:06)		<input type="checkbox"/> Select appropriate preferences	
			<input type="checkbox"/> Finance (14:28)			
			<input type="checkbox"/> Miscellaneous (6:00)			
			<input type="checkbox"/> Label Printer (1:34)			
			<input type="checkbox"/> One-click Documents (4:16)			
			<input type="checkbox"/> Statements (4:39)			
			<input type="checkbox"/> Lab Orders (4:48)			
			<input type="checkbox"/> Centralized (1:57)			
			<input type="checkbox"/> Payment Restrictions (3:35)			
			Optional Set Up	<input type="checkbox"/> Task Manager (5:24)		
				<input type="checkbox"/> ePrescribing (separate purchase) (14:30)		<input type="checkbox"/> Contact sales to purchase
				<input type="checkbox"/> Internal Bulletin (3:33)		
<input type="checkbox"/> Red-flag Rule (4:22)						
Inventory Set Up (optional)	<input type="checkbox"/> Discounts and Packages (10:39)		<input type="checkbox"/> Discounts and packages (optional)			
	<input type="checkbox"/> Product Setup (5:09)	<input type="checkbox"/> GO-BI Basic Inventory	<input type="checkbox"/> Set up inventory preferences			
	<input type="checkbox"/> Preferences>Perpetual Inventory (3:13)					
		<input type="checkbox"/> Location Preferences (6:51)				
Week 6						
MILESTONE 3	GO	Patient Information	<input type="checkbox"/> Patient Center (5:22)			
			<input type="checkbox"/> Demographic Tab (10:23)			
			<input type="checkbox"/> Insurance Tab (7:00)			
			<input type="checkbox"/> Marketing and Notes Tabs (4:35)			
			<input type="checkbox"/> Recall Tabs (5:52)			
			<input type="checkbox"/> Financial Info and Correspondence Hx Tab (4:23)			
			<input type="checkbox"/> HIPAA and eDocuments Tabs (8:28)			
			<input type="checkbox"/> Patient Exams Tab (3:20)			

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ROADMAP TO SUCCESS

OfficeMate

		Recorded Tutorials	Live Classes	Software Set Up	
MILESTONE 3	GO	Appt. Scheduler Functions	Week 6 (cont.)		
			<input type="checkbox"/> Scheduler Overview (6:34)	<input type="checkbox"/> GO-AS Using the Appointment Scheduler	
			<input type="checkbox"/> Scheduling Appointments (7:10)		
			<input type="checkbox"/> Modifying Appointments (7:02)		
			Week 7		
MILESTONE 4	GO	Optical Dispensary	<input type="checkbox"/> Creating Rx Orders (13:52)	<input type="checkbox"/> GO-LO Managing Your Lab Orders	
			<input type="checkbox"/> Using Rx Status (10:46)		
		Basic Financial Transactions	<input type="checkbox"/> Fee Slips (20:12)	<input type="checkbox"/> GO-PF Patient Financial Transactions	
			<input type="checkbox"/> Receipts (9:58)		
			<input type="checkbox"/> Ledger (9:34)	<input type="checkbox"/> GO-IF Insurance Financial Transactions	
			<input type="checkbox"/> End of Day (6:22)		
				Week 8	
	GO	Claims Processing	<input type="checkbox"/> Viewing Claims/Claim Search (6:39)	<input type="checkbox"/> GO-CP Claims Processing	
			<input type="checkbox"/> Correcting Errors (8:16)		
			<input type="checkbox"/> Printing Claims/Maintenance and Options (4:31)		
			<input type="checkbox"/> Creating Claims/Maintenance and Options (5:36)		
			<input type="checkbox"/> Reopening Claims for Resubmission (2:51)		
VSP Interface (optional)		<input type="checkbox"/> Set Up Review (17:51)	<input type="checkbox"/> GO-IF Insurance Financial Transactions		
	<input type="checkbox"/> Eligibility Through Claim Submission (8:55)				
			Week 9		
MILESTONE 5	GO	Advanced Financial Transactions	<input type="checkbox"/> Editing Fee Slips (8:40)	<input type="checkbox"/> GO-VSP VSP® Interface	
			<input type="checkbox"/> Posting Insurance Payments (10:23)		
			<input type="checkbox"/> Insurance Charge Backs and Overpayments (5:30)	<input type="checkbox"/> GO-PF Patient Financial Transactions	
			<input type="checkbox"/> Correcting Mistakes (5:54)		
			<input type="checkbox"/> Returning and Refunding Products (4:14)		
			<input type="checkbox"/> Unapplied Amounts (credits) (6:58)		
			<input type="checkbox"/> Electronic Remittance Advice (optional) (13:35)		

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		Recorded Tutorials	Live Classes	Software Set Up	
MILESTONE 5	GO	Week 10			
		Inventory Management (optional)	<input type="checkbox"/> Inventory Adjustments (7:12)	<input type="checkbox"/> GO-BI Basic Inventory	
			<input type="checkbox"/> Purchase Orders (8:48)	<input type="checkbox"/> GO-AI Advanced Inventory	
			<input type="checkbox"/> Transfers (3:34)		
			<input type="checkbox"/> Physical/Scan Count (12:55)		
		Processing Documents	<input type="checkbox"/> Recalls (7:53)		
			<input type="checkbox"/> Patient Demographic Assigned Letters (7:49)		
			<input type="checkbox"/> Delinquent Notices and Service Agreements (4:40)		
		Reports	<input type="checkbox"/> Reports Overview (12:12)		
			<input type="checkbox"/> Recommended Reports (16:59)		
			<input type="checkbox"/> Internal Marketing (6:28)		
			<input type="checkbox"/> Statements (8:41)		
			<input type="checkbox"/> Business Analysis (3:02)		
			<input type="checkbox"/> Custom Reports (11:47)		

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OfficeMate®/ExamWRITER® Support and Training Resources

OfficeMate/ExamWRITER offers multiple support and training resources for the implementation and maintenance of your system.

OfficeMate/ExamWRITER Resources - See links below for access to these resources.									
	On Demand Support Resources						Live Training Resources		
KEEP IT RUNNING	Additional Resources	F1 Online Help	OfficeMate User's Guide and Administration Guide	Online Knowledge Base	Recorded Video Tutorials	OfficeMate/ExamWRITER Enhancement Documents	Daily, Live Instructor-led Courses	Weekly "Ask the Expert" Courses	OfficeMate/ExamWRITER Educational Conferences
		Private Webinar Training \$150/hour		Onsite Training Starting at \$1,500/day			Virtual Users' Group Meeting		
OfficeMate Support Contact Information Support Center: 800.942.5353, option 1 E-mail: officematesupport@eyefinity.com					OfficeMate Training E-mail: officemateuniversity@eyefinity.com				

To get help for your Eyefinity® product, use one of the following methods:

- [Online Knowledge Base](#)
- F1 online help
- [OfficeMate User's Guide and OfficeMate Home Office User's Guide](#)
- [ExamWRITER Getting Started Guide](#)
- [OfficeMate Enterprise User's Guide and OfficeMate Home Office User's Guide](#)
- [OfficeMate Enhancements Documents](#)
- [ExamWRITER Enhancements Documents](#)
- [OfficeMate Enterprise Enhancements Documents](#)
- [Recorded video tutorials](#)
- E-mail **officematesupport@eyefinity.com**. Please include your name, contact number, and the best time and method to contact you, along with the details of the issue that you're reporting in your e-mail. The details could include the steps you were taking when the issue occurred and a screenshot of the issue. These details will help us quickly and effectively resolve your issue.
- Call Customer support at **800.942.5353, option 1** 6:00 a.m. - 5:00 p.m., PT. If your issue isn't critical, we recommend using the tools listed above before calling us. You might resolve your issue faster, or be able to provide us with details to help us quickly and effectively resolve it.
- To schedule a paid training e-mail OfficeMate Training at **officemateuniversity@eyefinity.com**.

Hours of Operation

Eyefinity offers toll-free client service from 6:00 a.m. to 5:00 p.m. PT. In 2013, we're closed Martin Luther King, Jr. Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, the day after Thanksgiving, Christmas Eve, and Christmas Day.

