



Sevocity Premier Training Guide

Before getting started

Get the computers ready

- Save the URL address of your PM login page as a favorite for every user:
- <https://prod.sevocitypm.com/>
- Make sure you have a recommended browser
 - Chrome is the preferred browser. We also support IE, Internet Explorer version 10 or higher, Edge and Safari for Mac, but not Safari for Windows.
 - If using Chrome, disable the Chrome PDF Plugin
 1. In the address bar type: <chrome://plugins>
 2. Click the 'Disable' link under 'Chrome PDF Viewer' (this will then default printing to Adobe PDF Reader which will work better)
- Adobe Reader is used for viewing reports, claims, etc. If you don't already have it installed, download and install now: <https://get.adobe.com/reader/othersversions/>

Keys to a Successful Implementation

1. Provide dedicated time

Ensure an environment in which all trainees can best learn the PM. Make time to attend scheduled web-training, including joining the session a few minutes early and conducting policy and procedure internal meetings. *Be sure you are not interrupted by phone calls, text, social media applications, meetings, or patient contact.*



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2. Conduct internal training sessions

We recommend you and your team carve out time to conduct internal training session. We find this makes for a smooth go-live transition and helps your team to present their question about workflow in-house.

- Prepare by identifying workflows, and responsibility
- Who is responsible for what task so as to organize internal training

3. Be prepared

- Assign an internal project manager as the main contact for the Client Manger and who will assign internal training and assess the progress of their group- including insurance enrollments and statement setup.
- Use the Help Center
 - Watch the recommended videos.
 - Use the system in advance of go-live to create Libraries, register a patient and other standard tasks
- Do assigned homework
- You may want to consider a reduction in scheduled patients for your first day on your new system.

4. Enrollments

Complete and return your insurance claim and statement enrollments at least 6 weeks prior to go-live. Be aware that ERA and Claims enrollment may be separate.