



## **PM Customization/ Office Manager Practice Scenarios and Questions**

**Go through the scenarios and questions below either individually or as a group to practice navigating around the practice management system.**

### **Practice Scenarios:**

You have a new employee start and you add them as a user to EZDERM, you would like to have this new employee cross-train between clinical and administrative. What role will you give the new employee?

My provider said we are going to start seeing Telemedicine patients, what are the steps you need to follow to make sure they can do this?

Where can I find all the one-time consents that patients sign at EZ-check-in?

What information should I provide EZDERM to be able to add a user to EZ-school?

Patients are taking too long to complete EZcheck-in what questions can I remove and how can I remove some of the questions?

The office bought a new laser machine and they would like to have an individual schedule for this laser, what do you have to do to add this?

My front desk can see all of the practice financials on the dashboard, how do I remove this?

The pathology lab is telling us that we need to have the name of the lab and account number. How would you add this?

We purchased the Square terminal, what are our next steps?

You signed up for Square and are now ready to take credit cards on file. How do we update the credit card on file consent? And how do you make sure that you have CCOF selected for patients to enter during EZcheck-in?

We purchased a new laser machine and we need to add a new consent for treatment, where would you add this?

With the new laser purchase, we need to add the price of the treatment, how would you add this price?

My front desk accidentally canceled an appointment and she does not know what patient was canceled, how do you locate this information in the audit log?

Where can I find all the one-time consents that patients sign at EZcheck-in?

What information should I provide EZDERM with to be able to add a user to EZ-school?

Do we need a scanner?

How many EZcheck-in iPads does the practice need?

## **Questions:**

- How do you create a new user
- What does the admin checkbox mean
- Why am I having a hard time adding a primary practice when adding a new user
- What reports should I be running at the end of the month
- How do I add a block on the schedule for a provider that will be out of the office
- How do I template the schedule
- How do I create additional appointment types
- How do I create an ancillary schedule
- How do you update the remit phone number in EZDERM
- What are the different types of consent categories
- How do you add items to the system
- How do you update the tax in the system
- How would you deactivate a user
- How do you add working hours
- Where do you update the HIPAA contact consent