

Settings

- Business**
 - Locations** - make sure all location details are entered, including rooms and tax rates if applicable.
 - Fax Accounts** - This is required for eRX. Sfax tickets are created automatically when added in OptiMantra Subscription or clinics can use their own fax number.
 - User Management** - Confirm users and their access are correct
 - Analytics roles can be configured as well.
 - Provider Settings** - Add provider photo, online description (if they want), confirm that profile details are completed (profile details, including credentials, must be complete for eRX)
 - Complete **header info** and **header logo** adjustment.
 - *Once the logo is uploaded, copy and paste the link into the online booking and patient portal settings pages. (Settings > Scheduling > Online Booking > Location Settings AND Settings > Patient Communications > Patient Portal)*
 - OptiMantra Subscription**
 - Tickets are auto-created when any add ons are added to the subscription, keep an eye on your inbox.
- Services**
 - Services (Fee Schedule)** - Create or edit services as needed (This area may also include procedures, labs, or other offerings of the clinic)
 - If you offer insurance add your fee schedule for your CPT codes
 - Service Packages & Service groups** - if applicable
- Scheduling**
 - Org Settings** - On the Org Settings page, you can configure organization-wide scheduling and calendar preferences. This includes calendar setup (such as view options and slot durations), email reminders

and policies (including calendar attachments), the order in which practitioners appear on the Scheduling page, and appointment status colors. These settings apply to your practice-wide calendar; email reminder details and shift management options can be customized in later sections.

- [Provider Calendar](#)** - Providers who do not need to show on the calendar can be hidden here (such as collaborating MD's), additionally this is where google calendar can be connected.
- [Online Booking](#)**
 - Location Settings** - Set your Online Booking settings by location, including configuring the Scheduler appearance, deciding on text confirmations, and setting up online payments. Generate your custom Online Booking link to embed in your website, and Preview Online Booking from here
 - Availability; by shift** - Create Shifts (single or recurring) to open up your Online Booking slots to clients
- [Prospect registration](#)** - complete if applicable to prescreen potential patients
 - (ex. Please complete the following appointment request form, next you'll be e-mailed a New Patient Questionnaire to complete securely online. Please check your spam/junk folder if you're unable to locate the questionnaire in your inbox. Please note that completing this questionnaire does not guarantee an appointment. Your questionnaire will need to be reviewed to determine if we're a proper fit for your needs and the providers' clinical capabilities. Please allow us 48 hours to review your request and respond via e-mail to schedule your initial appointment. Thank you for considering **PRACTICE NAME** for your needs.)
- [Forms](#)** - Have forms that you would like to use in your OptiMantra account? Upload them to a ticket and our team will add them in for you. If you are using forms from our shared library don't forget to do your due diligence and edit to meet your practice needs.
 - [Consent forms](#)**
 - [Clinical Profile](#)** - Choose which sections you would like to appear or hide on the patients clinical profile
 - [Chart Note / Intake Form](#)** - Adjust and remove inapplicable sections per practitioner
 - [Custom questionnaire](#)** - Add in questionnaires related to services

- [Patient handouts](#) - add in any handouts provided by the practitioner
- [Letter Templates](#) - add in referral and return to work/school letters if applicable

- Communications**
 - [Patient Portal](#) - Please select what items and forms are accessible for patients to fill out on the portal. You can also set your cancellation policy and give access to online booking, treatment plans, and bills. *Please note - Kiosk will use the same settings for the forms*
 - Consent forms: Make sure that any consents required for ALL patients are checked off.
 - Appointment type: Initial intake / follow-up intake checked of IF the provider would like to use the chartnote/intake form section of the chart as an intake form for the patients
 - Custom questionnaire: check any questionnaires to be completed based on service type being set to “initial” or “follow-up”
 - Questionnaire / Consents Specific to service type: Set questionnaires based on services (i.e. weight loss consent and weight loss initial intake set for service: Weight loss initial visit)
 - Don't forget to COPY PORTAL LINK into the reminder and template email as needed
 - [Reminder Email](#) - adjust reminder email to fit practice needs, set when reminder emails are automatically sent out, adjust email to portal or appropriate links, add emails to notification email destination and portal message destination
 - [Reminder text](#) - adjust reminder text to fit practice needs, set when reminder texts are automatically sent out
 - [Email Templates](#) - Configure any email templates you would like available within the practice for patient communications.

- Clinical Templates**
 - Add in templates relevant to service types for [SOAP, Categorized, and DOT Phrase](#) Templates
 - [Annotable Images](#) - Upload full body male and female, face male and female, muscles male and female, and any other needed generic patient images
 - [Favorite ICD's](#) - Add in any ICDs provided by the provider
 - [IV, IM & Herbal Formulations](#) - add in formulations if applicable

Clinical Integrations

- Lab & Diagnostic templates** - Add in any lab or diagnostic panels requested by provider

Payments

- Processing** - If using Authorize.net assure that API login ID and API Transaction key are entered (REMOVE TEST MODE!) or that stripe or FISERV is connected
- Customize Superbill** - Adjust areas seen on superbill i.e. remove insurance related stuff if clinic is cash pay only
- Patient Invoicing** - For clinics using an integrated payment processor add in invoicing text.
 - ex. Hello FIRST_NAME_OR_NICK_NAME, Please find attached the invoice for your services with **PRACTICE NAME**. If you have any questions about the invoice, you can contact us at any time. We look forward to seeing you again soon!
- Good Faith Estimate Templates** - Add in good faith template (for providers using insurance)

Taking Insurance? Attend:

- Insurance Billing Overview: This is a group session held for those who are getting set up with insurance billing. The call covers Insurance billing basics, the OptiMantra insurance set-up, and Guidance on EDI/ERA/EFT set-up. [To join, please click here.](#)
- Insurance Billing Q&A: Also a group training, this session covers claims support and trouble shooting error codes. This training is ideal for staff and providers who are actively billing insurance. [To join, click here.](#)