

MEETING MINUTES

Meeting date [09/01/2021] Time [2:00 EST]

Client Name His Vision Eye Care
Note Taker Shannon Chaney

Attendees: Dr. Groves, Scott and Marianne

AGENDA TOPICS: KB Call 1

Discussion:

- Introduction to Knowledge Base
- What is Knowledge Base and how does it relate to IntellectPRO
- Basic Filtering Rules and Navigation
- Remember to do a Backup(stack of coins) prior to making changes- Safety Net!
- Knowledge Base Permissions- Only Physicians and Admin currently
- Reviewed CCHPI, Diagnostic testing, Procedures and Procedure Notes
- Reviewed setting Exam Segment Findings and Defaults- must be in the "In Use" list in Findings, then can set as a default under Exam/Testing Default Findings
- Discussed Discussion Points and Defaulting
- Discussed KB Edit Tool- pencil in top right hand corner when adding discussion points, allows you to search for new discussions without leaving the exam
- Any requests not found in Knowledge Base please send to me
- After your practice is "Live" in IntellectPRO, you can send Knowledge Base requests through the community portal or by calling Support. KB requests can take 2-3 weeks to complete.

Reminders/Action Items:

- Reorder Diagnostic tests- you can check in chart to see your changes
- Practice in charts to familiarize yourself with different sections for our next call

Remember to use the Community Portal as your resource for educational webinars and helpful how-to's if you have questions in between phone sessions!

Login here: <http://www.nextech.com/client-support>

Watch Step 3:

<https://nextechsupport.force.com/nextech/s/topic/0TO33000000Lpu0GAC/intellectpro-step-3-getting-started>

KB Edit Tool Webinar

<https://nextechsupport.force.com/nextech/s/article/IntellectPRO-KB-Editing-tool>