ENGAGE22 Session Catalog

Session catalog overview

The ENGAGE22 Session Catalog provides a full view of conference sessions. Starting in December 2021, you can use this catalog to build your schedule with sessions relevant to your practice, specialty, and role. If you are registered for ENGAGE22, you will receive an email notifying you that sessions are available so you can sign up through our registration portal.

How to navigate this guide

Use this guide to pre-plan the sessions you or your practice colleagues would like to attend. Click on the links below to jump to a session. Within these different sections, you can view sessions related to industry and regulatory knowledge, peer networking and best practice sharing, product utilization and optimization, product roadmaps, professional development, and revenue cycle optimization.

Sessions by platform

To view **product-agnostic** sessions, Click here.

Are you an **Intergy client** interested in sessions specific to **Intergy?** **Click here.**

Are you a **Prime Suite** client interested in sessions specific to **Prime Suite?** **Click here.**

Pre-conference sessions

We are offering several pre-conference sessions for clients who want to take their ENGAGE22 experience to the next level. These sessions are marked as "pre-conference" and appear in bold in the guide. Please note, pre-conference sessions are not included in the conference registration fee and must be purchased separately for $350 per person per session or $600 for the entire day.

Virtual conference sessions

New this year! Separate from our on-site event, we will offer a virtual conference track for those unable to attend in person. Virtual sessions are marked with an asterisk (*) in the guide.

Please note, the information outlined in this catalog is subject to change.

ENGAGE22 Session Catalog

Product-agnostic sessions

Session category: Industry & regulatory knowledge		
Course title	**Description**	**Audience (by role)**
*Data Security in the Healthcare Sector	**What:** Members of Greenway's Privacy, Cybersecurity & Compliance team will discuss administrative, physical, and technological strategies to ensure the confidentiality, integrity, and availability of PHI. We will discuss how you can protect your practice from network penetration, ransomware, and other threats. **Takeaways:** Insights on data security and how to better protect your practice from cyber threats.	Administrative, IT
*How to Recognize and Evaluate Opportunities for Value-Based Care within Your Practice	**What:** Discussion of value-based care and its opportunities for transformational changes in terms of care delivery and patient access beyond face-to-face visits. **Takeaways:** Increased understanding of how to leverage opportunities within your practice and make transformational changes that may be required to become patient centric and outcome oriented.	Administrative, Billing, Clinical
*How to Use People, Process, and Technology to Pursue Your Value-Based Care Goals	**What:** How to achieve sustainable transformation to pursue your value-based care goals for reduced administrative burden, increased clinical team efficiency, and greater patient access to care. **Takeaways:** Knowledge on efficient workflows, processes, and approaches using the Greenway suite in pursuit of patient-centric value-based care.	Administrative, Clinical, Front office
*Regulatory: eCQM Lifecycle – Technical Details	**What:** Learn about the eCQM lifecycle, with details on each measure. **Takeaways:** Know the details of each measure to successfully report in 2022 for eCQMs.	Administrative, Clinical
*Regulatory: Patient Centered Medical Homes	**What:** Discussion about PCMH, including how and why a practice might want to pursue PCMH recognition, plus best practices from Greenway PCMH clients. **Takeaways:** Understand PCMH, learn best practices to help transform your practice.	Administrative, Clinical
*Regulatory: The Future of MIPS (MIPS and Intro to MVP)	**What:** Learn about 2022 MIPS and the future of MIPS Value Pathways (MVP) reporting, and what it means for Greenway products. **Takeaways:** Understanding reporting programs and how Greenway will support clients.	Administrative, Clinical, IT
*The Future of Virtual Care	**What:** What the future of virtual care looks like according to trends in the industry as the COVID-19 pandemic subsides. **Takeaways:** How Greenway's multitude of virtual care products can keep practices up to date with the everchanging healthcare requirements and regulations.	Administrative, Billing, Clinical, C-Suite, Front office
*The Great Resignation	**What:** Panel discussion regarding the current employment landscape amid the "Great Resignation." **Takeaways:** Learn what your peers are doing to retain their current staff and attract quality candidates.	Administrative, C-Suite

Washington and You: Connecting the Dots on Policy Initiatives for 2022 and Beyond	**What:** A look at various legislative and federal activities that can impact your practice, with a focus on topics including the following: • The CY 2022 Medicare Physician Fee Schedule • The future of telehealth and remote patient monitoring • Payment reform and value-based care policy discussions • The future of 21st Century Cures **Takeaways:** An understanding of how policy is being discussed on a federal level, who is invested in moving these discussions forward, and how it could impact a provider's practice now and in the future.	Administrative, Billing, Clinical, C-Suite,

Session category: Peer networking & best practice sharing

Course title	Description	Audience (by role)
Best Practice Networking Session: Increasing Patient Satisfaction through Technology	**What:** Join peers involved in business administration and operations to share ideas about meeting patients where they are as consumers of healthcare to create more satisfying experiences. **Takeaways:** Understand the consumer mindset of patients, the experiences provider organizations would be best suited to deliver through digital technology, and best practices for establishing these technologies within your workflows.	Administrative, Clinical, C-Suite, Front office
Best Practice Networking Session: Social Media for Healthcare Organizations	**What:** Join peers to share best practices for using social media to promote your practice and connect with your patients. **Takeaways:** Share lessons you have learned and get takeaways from others' experience to use in your own organization.	Administrative, Front office
Specialty Networking (13 breakout sessions)	**What:** Join your peers for a Greenway facilitated networking session providing the perfect opportunity to share your best practices and innovative ideas for your specialty. **Takeaways:** Receive feedback and make new connections with like-minded individuals. **Choose from the following specialties: Cardiology/Pulmonary, ENT/Allergy & Immunology, Family Practice/Internal Med/Primary Care, FQHC/CHC/RHC, Gastroenterology, Multi-Specialty, Neurology, OB-GYN, Orthopedics, Pediatrics, Surgery/Pain Management, Tribal Health, Urology**	Administrative, Clinical, Front office

Session category: Product roadmap

Course title	Description	Audience (by role)
*Roadmap: Greenway Insights	**What:** Learn about the current and future plans for Greenway Insights, the data analytics and regulatory platform for Greenway solutions. In 2022, Greenway Insights will be the regulatory reporting platform for Intergy and Prime Suite. **Takeaways:** Understand the capabilities and use cases for Greenway Insights and how it will aid in regulatory reporting.	Administrative, Clinical, Front office

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Specialty Usability Workshop	**What:** Workshop with the Greenway UX team and other clients to brainstorm ideas on how we can enhance the software to help you. You will be grouped with people in a similar specialty/role, ideating and sketching together as a team. Then, everyone will vote on their favorite idea(s) from the different teams. **Takeaways:** Your ideas and concepts will be used by both the Product team as suggestions for new features or enhancements and the UX team as possible design suggestions. **Choose from the following specialties: Cardiology/Pulmonary, ENT/Allergy & Immunology, Family Practice/Internal Med/Primary Care, FQHC/CHC/RHC, Gastroenterology, Multi-Specialty, Neurology, OB-GYN, Orthopedics, Pediatrics, Surgery/Pain Management, Tribal Health, Urology**	Administrative, Billing, Clinical, C-Suite, Front office, IT

Session category: Product utilization & optimization		
Course title	**Description**	**Audience (by role)**
*Greenway Health New Offerings: Greenway Care Coordination Services — How Remote Patient Monitoring can Enhance Your Chronic Care Management Program	**What:** Get information regarding the newest additions to Greenway Care Coordination Services, including Remote Patient Monitoring, Greenway Managed Enrollment (telephonic), and integrated behavioral services. **Takeaways:** How the available programs work and how you can benefit from using Chronic Care Management and Remote Patient Monitoring together for real-time decision making.	Administrative, Billing, Clinical, C-Suite, Front office
*Support: Navigating My Greenway and our New Beacon Training Dashboard	**What:** A training session on basic functions when utilizing My Greenway and our new training platform, Beacon. **Takeaways:** Clients will see how to navigate through My Greenway and address any known issues, as well as get an overview of how Beacon works from an admin's perspective and a user's perspective.	Billing, Clinical, C-Suite, Front office, IT,
*The Way Greenway Clients are Successfully Using Greenway Patient	**What:** Get insight on using Greenway Patient features to optimize regulatory reporting, plus new features to come that will help your practice easily adhere to the 21st Century Cures information sharing requirements. **Takeaways:** With the 21st Century Cures Act coming to fruition, see how GPP/GPM can assist in the transition.	Administrative, Billing, Clinical, C-Suite, Front office
*The Way Greenway Clients are Successfully Using Telehealth	**What:** Addressing how to continue to use telehealth past the COVID-19 pandemic, plus new features to come. **Takeaways:** How clients can utilize telehealth to help their practice create a successful, long-term virtual care strategy while staying compliant.	Administrative, Clinical, Front office

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Session category: Professional development		
Course title	**Description**	**Audience (by role)**
Situational Leadership	**What:** Interactive workshop with Ken Blanchard Companies teaching the globally recognized Situational Leadership® II model, used by managers to motivate, direct, and ultimately develop employees into self-reliant problem solvers. **Takeaways:** Leaders will learn to diagnose the needs of an individual and then use the appropriate leadership style to effectively respond to those needs.	Administrative, C-Suite
Women Empowering Women Panel Discussion	**What:** Panel discussion covering everything from career success to personal growth and support. **Takeaways:** Get questions answered and hear from your peers, female leadership at Greenway, and within the industry about their experiences and advice.	Administrative, Billing, Clinical, C-Suite, Front office, IT

Session category: Revenue cycle optimization		
Course title	**Description**	**Audience (by role)**
Pre-Conference: Workshop: A/R Health Deep Dive	**What:** During this four-hour workshop, practices will be provided a worksheet to enter their data and perform a financial analysis, including trend reviews, which will show how to identify root causes within the A/R. Please note, participants will be asked to complete "pre-homework" reports that will be used during the workshop. **Takeaways:** Learn how to assess your practice, understand which key performance indicators (KPIs) and trends to track, and learn how to pull the appropriate reports.	Administrative, Billing, Front Office
Developing a Firm Relationship with Your Greenway Revenue Services Team	**What:** Processing billing and collections has always been a key indicator of business longevity and future growth. In the most recent 18 months, this success has kept some in business and pushed others out. Developing a firm business relationship with those in charge of collections requires everyone working on the same page with the same pre-set goals and expectations for both parties. **Takeaways:** This presentation will address many of the key factors associated with the development of a working relationship and its challenges and hurdles, along with a successful pathway to reimbursement. *Please note, this session is open to all clients, but it will be the most valuable for current Greenway Revenue Services clients or those that are interested in establishing and building a relationship with the Greenway Revenue Services team.*	Administrative, Billing, C-Suite
*Revenue Cycle Best Practice: Patient A/R	**What:** From appointment to payment, learn best practice on eligibility, workflows, system setup (statements and collections), and collecting from the patient. **Takeaways:** Learn how to get the most out of your workflows, different best practices, and the importance of understanding your state laws.	Administrative, Billing, Front Office

*Roadmap: Greenway Clearinghouse Services — Benefits and What's New	**What:** Learn about the latest and greatest features of GCS, how you can use the GCS portal to optimize your billing practices, our improved stability initiatives, as well as the current roadmap and what's coming up. **Takeaways:** Insight into the current state of GCS and where the product is headed.	Administrative, Billing, Front Office

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Intergy-specific sessions

Session category: Industry & regulatory knowledge		
Course title	**Description**	**Audience (by role)**
Pre-Conference: CHC Session – UDS 2022 Workflows and Reporting (Intergy)	**What:** Overview of workflow changes for 2022 UDS measures based on eCQM updates, best practice workflows for difficult tables/rows, any other changes documented in 2022 PAL (if available in time), and updates for using Greenway Insights™ for UDS. **Takeaways:** Increased confidence in using Greenway's products and resources for UDS reporting.	Administrative, Clinical
Pre-Conference: Deep Dive into CQM (Intergy)	**What:** Deep dive into measure workflows by program (e.g., MIPS and CPC+), best practices to avoid documentation errors, how to troubleshoot certain measures, and industry resources for program/measure specific questions. **Takeaways:** Increased confidence in using Greenway's products and resources for eCQM reporting.	Administrative, Clinical
Pre-Conference: Deep Dive into PI (Intergy)	**What:** Deep dive into workflows (e.g., e-prescribing, electronic referral loop, patient electronic access, health information exchanges), best practices to avoid documentation errors, how to troubleshoot certain measures, industry resources for program/measure specific questions, and updates for using Greenway Insights™ for Promoting Interoperability. **Takeaways:** Increased confidence in using Greenway's products and resources for PI reporting.	Administrative, Clinical
*Regulatory: UDS Capturing within Intergy	**What:** Learn about UDS reporting and tools to assist FQHCs with UDS capture and MEDCIN forms. Walk through Help guidance in Greenway Insights, plus a look at data capture. **Takeaways:** Enhanced understanding of the Greenway Insights UDS dashboard audience for clinical and administrative staff.	Administrative, Clinical

Session category: Peer networking & best practice sharing		
Course title	**Description**	**Audience (by role)**
Best Practice Networking Session: Help Clinicians with Best Practices for Clinical Documentation (Intergy)	**What:** Join your fellow Intergy clinicians, clinical support teams, and EHR trainers for a discussion regarding best practices for clinical documentation. Share lessons you have learned and get takeaways from others' experiences to use in your own organization. **Takeaways:** In this session, we will take a patient-centered approach when discussing how care teams of all sizes can optimize documentation.	Administrative, Clinical

Course title	Description	Audience (by role)
IT Roundtable for Intergy Clients	**What:** Brings best practices to the table for discussions about performance, engaging you directly in a Q&A about Intergy's technical roadmap. **Takeaways:** Answers to questions you may have regarding Intergy use as well as an understanding of Greenway's plans for the technical infrastructure of Intergy.	Administrative, Billing, Clinical, C-Suite, Front office

Session category: Product roadmap		
Course title	**Description**	**Audience (by role)**
*Roadmap: Intergy	**What:** Learn about the Intergy Transformation Plan, through which the future is designed by you, for you. Our Product Management and Product Development teams have listened to you, gathered your feedback and suggestions, and put them into action as Greenway reimagines the clinical and support staff experience. **Takeaways:** Learn about the refreshed user interfaces to improve product usability, delivery of 100 client-requested feature enhancements, and new strategic partnerships to deliver innovation to your practice.	Administrative, Billing, Clinical, C-Suite, Front office, IT

Session category: Product utilization & optimization		
Course title	**Description**	**Audience (by role)**
Intergy Advanced: Best Practices – Orders and Charges	**What:** A look at best practices for Orders and Charges. **Takeaways:** After this session, the expectation is you will return to your practice able to set up patient orders, tie charges and document templates to orders, create a list of favorite charge and diagnosis codes, create order tasks, and create favorite prescriptions.	Clinical
Intergy Advanced: Labs in Intergy	**What:** Functionality training and best practice workflow recommendations for Labs within Intergy. **Takeaways:** Learn about ordering labs, tracking results, entering results, contacting patients to discuss results, flowsheets, and other features.	Clinical
Intergy Advanced: Long-term Maintenance for Orders, Prescriptions, and Labs – Intergy EHR	**What:** A look at long-term maintenance for Orders, Prescriptions, and Labs in the Intergy EHR. **Takeaways:** After this session, the expectation is you will return to your practice able to manage outstanding orders from the orders tab; update orders setup including macros, linking orders with CPT codes, and POM tab; update favorite procedures/dx list; create comprehensive medication favorites; ensure process in place to update (at least quarterly) the Pharmacy file and the Drug/Formulary files; ensure Rx EDI queue is monitored for rejected Rx submissions (or ensure someone set to receive notifications), and retrieve clinician lab results daily and ensure all unmatched results are resolved.	Clinical

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Intergy Advanced: Peer-led Session – Clinical	**What:** Join fellow Intergy users as they lead a discussion about best practices for clinical functionalities and roles. Network with other users. **Takeaways:** Clinical-related best practices and lessons learned from other organizations utilizing Intergy.	Administrative, Clinical
Intergy Advanced: Peer-led Session – Practice Management	**What:** Join fellow Intergy users as they lead a discussion about best practices for practice management functionalities and roles. Network with other users. Takeaways: Practice management-related best practices and lessons learned from other organizations utilizing Intergy.	Administrative, Billing, Front office, IT
Intergy Advanced: Revenue Cycle Management Optimization – Maximizing Claim Control	**What:** A look at revenue cycle management optimization and maximizing Claim Control. **Takeaways:** After this session, the expectation is you will return to your practice able to establish task codes, establish Follow up Reason codes/FURCs, properly utilize Claim Control, use Intergy for denial management and to quickly recognize denial trends, increase your clean claim rate with Intergy tools, and understand best practices for claims follow up to ensure no claims fall through the cracks, resulting in increased revenue.	Administrative, Billing
Intergy Advanced: Tips and Tricks – Extended Pages and Using Questionnaires	**What:** Tips and tricks for extended pages and using questionnaires. **Takeaways:** After this session, the expectation is you will return to your practice able to set up and use Extended Pages and Questionnaires.	Administrative, Billing, Clinical
Intergy Advanced: Tips and Tricks – Understanding the Patient Info ID Feature and How to Set Up/Use Advanced Appointment Scheduler	**What:** Tips and tricks for the Patient Info ID feature, plus a look at how to set up and use the Advanced Appointment Scheduler. **Takeaways:** After this session, the expectation is you will return to your practice able to understand and use the Patient Information ID feature and set up and use the Advanced Appointment Scheduler.	Administrative, Billing, Clinical
Intergy Beginner to Intermediate: Billing Setup – Key Setup Tables	**What:** Learn about billing setup on the Intergy platform. **Takeaways:** After this session, you will return to your practice able to access, create, and modify Provider Setup, Referring Provider Setup, Service Center Setup, Diagnosis Codes, and Practice Parameters, Procedure Codes, Profiles and Fees, Macros, Admin Charge Codes, and Auto Assign Insurance Rules. You will gain a greater understanding of the effects of these changes on Intergy functionality.	Administrative, Billing
Intergy Beginner to Intermediate: Billing Setup – Managing Codes and Contracts	**What:** Learn about managing codes and contracts. **Takeaways:** After this session, the expectation is you will return to your practice able to access, create, and modify Procedure Codes, Profiles and Fees, Macros, Admin Charge Codes, and Auto Assign Insurance Rules. You will gain a greater understanding of the effects of these changes on Intergy functionality.	Administrative, Billing

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Intergy Beginner to Intermediate: Billing Setup – Managing Insurance Tables	**What:** Learn about managing insurance tables. **Takeaways:** After this session, the expectation is you will return to your practice able to access, create, and modify Insurance Carriers and Insurance Plan Information. You will gain a greater understanding of the effects of these changes on Intergy functionality.	Administrative, Billing
Intergy Beginner to Intermediate: Billing Setup – Statements and Collections Setup	**What:** Learn about statements and collection setup. **Takeaways:** After this session, the expectation is you will return to your practice able to access and modify Statement Parameters; access, create, and modify Collection Parameters; access, create, and modify Collection Setup; and access and modify Payment Posting parameters.	Administrative, Billing
Intergy Beginner to Intermediate: Billing Workflow – Charge Posting	**What:** Learn about billing workflow – charge posting. **Takeaways:** After this session, the expectation is you will return to your practice able to understand basic parameters that impact charge posting, post charges and admin charges, and utilize journal balancing.	Billing
Intergy Beginner to Intermediate: Billing Workflow – Claims Maintenance	**What:** Learn about billing workflow – claims maintenance. **Takeaways:** After this session, the expectation is you will return to your practice able to understand insurance billing processes, generate claim batches, resolve pre-bill errors, transmit and print paper claims, rebill claims, and understand Claims Control.	Billing
Intergy Beginner to Intermediate: Billing Workflow – Guarantor Collections	**What:** Learn about billing workflow – guarantor collections. **Takeaways:** After this session, the expectation is you will return to your practice able to understand the basics of practice configuration, utilize the scheduling system job functionality, work with actions and payment plans, use Tickler functionality, and generate collection letters using action codes.	Administrative, Billing
Intergy Beginner to Intermediate: Billing Workflow – Payment Posting and Balancing	**What:** Learn about billing workflow – payment posting and balancing. **Takeaways:** After this session, the expectation is you will return to your practice able to post guarantor and insurance payments, utilize journals and journal balancing, edit and delete payments, transfer monies to unapplied credit, and generate payment reports.	Billing
Intergy Beginner to Intermediate: Chart Setup – Correspondence and Imaging	**What:** Learn about correspondence and imaging. **Takeaways:** After this session, the expectation is you will return to your practice able to build document templates; generate correspondence; generate coordination of care documents for referrals; and create imaging categories.	Clinical

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Intergy Beginner to Intermediate: Chart Setup — Encounter Note Setup and Forms Designer	**What:** Learn about chart setup — Encounter Note setup and Forms Designer. **Takeaways:** After this session, the expectation is you will return to your practice able to configure Encounter Note preferences, set up custom Encounter Note sections, and create encounter note shortcuts, as well as design and edit Encounter Note forms.	Clinical
Intergy Beginner to Intermediate: Chart Setup — Orders Setup	**What:** Learn about chart setup and Orders setup. **Takeaways:** After this session, the expectation is you will return to your practice able to understand basic Orders setup screen-type, sub-type, and Order Description; create lab and charge favorites; create an order during a visit; create an order correspondence and AUC.	Clinical
Intergy Beginner to Intermediate: Chart Setup — Task Setup and Administration	**What:** Learn about chart setup — task setup and administration. **Takeaways:** After this session, the expectation is you will return to your practice able to utilize the Task Tab; set up tasking groups; set up task monitoring; set up Task Routing; run tasking reports; and complete a task.	Administrative
Intergy Beginner to Intermediate: Clinical Workflow — Encounter Note Workflow	**What:** Learn about clinical workflow — Encounter Note workflow. **Takeaways:** After this session, the expectation is you will return to your practice able to create an Encounter Note; document active problems, care plan, and instructions in the note; build a favorite in Encounter Note; utilize the "previous encounter" button; create and add favorite free-text to a note; and sign notes.	Clinical
Intergy Beginner to Intermediate: Clinical Workflow — Orders and Charges Workflow	**What:** Learn about clinical workflow — Orders and Charges workflow. **Takeaways:** After this session, the expectation is you will return to your practice able to set order preferences; create an order in EHR; submit charges through EHR; utilize the POM tab and the Rx tab; update the Problems list; and void an order.	Clinical
Intergy Beginner to Intermediate: Clinical Workflow — Patient Chart	**What:** Learn about clinical workflow — patient chart. **Takeaways:** After this session, the expectation is you will return to your practice able to navigate a patient's chart; filter and set custom chart preferences; change the layout of a patient's chart; enter patient medications, allergies, and problems; edit/update patient history; review patient documents, encounters, and images; and utilize the Encounter and Orders tab.	Clinical
Intergy Beginner to Intermediate: Front Desk Workflow — Check-in/Check-out Processes	**What:** Learn about front desk workflow — check-in/check-out processes. **Takeaways:** After this session, the expectation is you will return to your practice able to understand the basic features of the patient flow tracking/check-in module, work with actions and events and understand how they impact Intergy EHR, complete the check-in/out process, and view a patient's eligibility and pre-collect a payment.	Front office

Intergy Beginner to Intermediate: Front Desk Workflow – Front Desk Bonus Tips	**What:** Learn about front desk workflow – front desk bonus tips. **Takeaways:** After this session, the expectation is you will return to your practice able to navigate practice configuration options (chart views), understand appointment scheduling advance search macros, set up basic actions and events, understand the standardizing of patient information ICONS/pages, and work with encounter resolution.	Front Office
Intergy Beginner to Intermediate: General Setup – Code Setup	**What:** Learn about general setup – code setup. **Takeaways:** After this session, the expectation is you will return to your practice able to set up and maintain Actions and Events; maintain Phone Messaging; maintain Alerts and Quick Text; and create and maintain Imaging files.	Administrative, Front Office
Intergy Beginner to Intermediate: General Setup – Referral Setup, Management, and Reporting	**What:** Learn about general setup – referral setup, management, and reporting. **Takeaways:** After this session, the expectation is you will return to your practice able to access, review, and update referral parameters; access, review, and update referral setup; and manage referrals	Administrative, Billing
Intergy Beginner to Intermediate: General Setup – Schedule Setup and Maintenance	**What:** Learn about general setup – schedule setup and maintenance. **Takeaways:** After this session, the expectation is you will return to your practice able to create and modify Appointment Codes and Classes; create Appointment Templates; create Schedule Rotations; assign Rotations to a provider and practice; and assign Individual Schedule changes to specific dates on a provider's schedule. You will gain a greater understanding of the effects of these changes on Intergy functionality.	Administrative, Front office
Intergy Beginner to Intermediate: General Setup – Task Setup and Administration	**What:** Learn about general setup – task setup and administration. **Takeaways:** After this session, the expectation is you will return to your practice able to create new General & Charge task types; set up Task Monitoring and Routing; administration of tasks.	Administrative, Billing
Intergy New System Features – v12.00 to Current (PM and Clinical)	**What:** A session to show you all of the feature and functionality updates offered in each of our major versions since Intergy v12.00 to the latest version, plus the benefits of upgrading. **Takeaways:** Understanding how the latest version of Intergy will benefit your practice, and how easy it can be to upgrade.	Administrative, Clinical, Front Desk
Technical Q&A – Intergy IT Roundtable	**What:** Join us to network with other IT individuals and clients in an open-style forum. Greenway technical support representatives will discuss Greenway technology updates and answer questions regarding the Intergy platform and its required infrastructure. **Takeaways:** Understand product updates on Intergy and its required technical infrastructure.	Administrative, Clinical, Front Desk, IT

Session category: Revenue cycle optimization

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Course title	Description	Audience (by role)
Insurance Workflows and Tips (Intergy)	**What:** This session will cover how to identify top reasons for claim rejections/denials and educate on best practices, as well as how to stay up to date on new changes to billing requirements. Takeaways: Understand the top reasons why your claims are being rejected/denied, learn how to stay up to date on billing requirements, understand changes to the 2021 E/M guidelines, get recommendations on how to stay up to date on changes.	Administrative, Billing, Front Office
Revenue Cycle Best Practice: Strategy in AR Reporting — Setup and Impact to Data (Intergy)	**What:** This presentation will help identify the story behind KPIs and industry benchmarks, empowering positive impacts on efficiency and revenue. Additionally, we will cover best practices to achieve thoughtful organization of procedure codes, finance groups, carrier/plans, finance centers, profiles, and more. **Takeaways:** Learn best practices for daily, weekly, monthly, and year-end reporting, the meaning behind certain KPIs and industry benchmarks, and how to leverage reports to improve workflows, as well as to set and track goals.	Administrative, Billing, Front Office

ENGAGE22 Session Catalog

Prime Suite-specific sessions

Session category: Industry & regulatory knowledge		
Course title	**Description**	**Audience (by role)**
Pre-Conference: Deep Dive into CQM (Prime Suite)	**What:** Deep dive into measure workflows by program (e.g., MIPS and CPC+), best practices to avoid documentation errors, how to troubleshoot certain measures, and industry resources for program/measure specific questions. **Takeaways:** Increased confidence in using Greenway's products and resources for eCQM reporting.	Administrative, Clinical
Pre-Conference: Deep Dive into PI (Prime Suite)	**What:** Deep dive into workflows (e.g., e-prescribing, electronic referral loop, patient electronic access, health information exchanges), best practices to avoid documentation errors, how to troubleshoot certain measures, and industry resources for program/measure specific questions. **Takeaways:** Increased confidence in using Greenway's products and resources for PI reporting.	Administrative, Clinical

Session category: Peer networking & best practice sharing		
Course title	**Description**	**Audience (by role)**
Best Practice Networking Session: Help Clinicians with Best Practices for Clinical Documentation (Prime Suite)	**What:** Join your fellow Prime Suite clinicians, clinical support teams, and EHR trainers for a discussion regarding best practices for clinical documentation. Share lessons you have learned and get takeaways from others' experiences to use in your own organization. **Takeaways:** In this session, we will take a patient-centered approach when discussing how care teams of all sizes can optimize documentation.	Administrative, Clinical
IT Roundtable for Prime Suite Clients	**What:** Bring best practices to the table for discussions about performance, engaging you directly in a Q&A. **Takeaways:** Answers to questions you may have regarding Prime Suite use and an understanding of Greenway's plans for Prime Suite's technical infrastructure.	Administrative, Billing, Clinical, C-Suite, Front office

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Session category: Product roadmap		
Course title	**Description**	**Audience (by role)**
*Roadmap: Prime Suite	**What:** Learn about the transformation and future of Prime Suite! Our Product Management and Product Development teams have listened to you, gathered your feedback and suggestions, and put them into action as Greenway reimagines the clinical and support staff experience. **Takeaways:** Learn about the new, modernized Prime Suite, which completes its roll-out with the release of v18.35, how we are ensuring your practice meets 21st Century Cures requirements, and how we plan on incorporating client-requested enhancements into the Prime Suite roadmap.	Administrative, Billing, Clinical, C-Suite, Front office, IT

Session category: Product utilization & optimization		
Course title	**Description**	**Audience (by role)**
Prime Suite Advanced: Best Practices — Orders and Charges	**What:** Learn about best practices — orders and charges. **Takeaways:** At the end of this session, you will be able to identify the relationship between orders and charges in the note and superbill, master the setup of the order concepts, and review how to place orders in the various notes and submit those orders.	Administrative, Clinical
Prime Suite Advanced: Immunization Setup and Workflow (Immunization Knowledge Required)	**What:** Learn about Immunization setup and workflow. **Takeaways:** Attendees will learn how to use the Immunization Grid as well as how to document and administer immunizations at point of care from the order. Additionally, we will cover how to customize your vaccine schedules and generate immunization reports to suit your practice needs.	Administrative, Clinical

Prime Suite Advanced: Long-term Maintenance – Clinical and Practice Management	**What:** Learn about long-term maintenance – clinical and practice management. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Verify Patient List, Orders Tracking, and Task filters are appropriately set up to streamline workflows • Clean up outstanding Orders • Handle Unsigned Results and Documents in a timely manner • Manage Vocabulary Reconciliation • Update templates • Verify that mid-level care providers have all Override options built correctly for billing purposes • Identify steps to add new care providers into system and prepare them for efficient usage • User Rights/Group Rights/Roles Based access • Desktop Functionality (filters, tasking, information, email, etc.) • Registration Menu items (information, referral management, eligibility) • Flags – Insurance Companies/Plans • Scheduling • A/R Maintenance (procedure codes, charge master, fee schedules, reporting codes, ERA configuration, collections module, etc.) • Reporting (daily and monthly analysis)	Administrative, Clinical
Prime Suite Advanced: Long-term Maintenance – Practice Management Long-term Maintenance	**What:** Learn about long-term maintenance – practice management. **Takeaways:** After this session, you should be able to maintain the following areas of the system: • User Rights/Group Rights /Roles Based Access, Desktop Functionality (filters, tasking, information, email, etc.) • Registration Menu items (information, referral management, eligibility) • Flags • Insurance Companies/Plans • Scheduling • A/R Maintenance (procedure codes, charge master, fee schedules, reporting codes, ERA configuration, collections module, etc.) • Reporting (daily and monthly analysis)	Administrative
Prime Suite Advanced: Peer-led Session – Clinical	**What:** Join fellow Prime Suite users as they lead a discussion about best practices for clinical functionalities and roles. Network with other users. **Takeaways:** Clinical-related best practices and lessons learned from other organizations utilizing Prime Suite.	Administrative, Clinical
Prime Suite Advanced: Peer-led Session – Practice Management	**What:** Join fellow Prime Suite users as they lead a discussion about best practices for practice management functionalities and roles. Network with other users. **Takeaways:** Practice management-related best practices and lessons learned from other organizations utilizing Prime Suite.	Administrative, Billing, Front office, IT

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Prime Suite Beginner to Intermediate: Billing Setup – Background Rules	**What:** Learn about billing setup – background rules. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Access, review, and update all five tabs within A/R Configuration: Billing Configuration, Credit Configuration, ERA Configuration, Payment Configuration, and G-Code Configuration • Access, review, and update all six tabs within A/R Lookup Tables: Adjustment Sub-Types, Claim Codes, Follow-Up Reason Codes, Reporting Codes, and Credentials • Understand the effects of these changes on Prime Suite functionality • Review and manage Insurance Class categories • Determine whether current Insurance Company setup is as streamlined as possible for staff use • Understand the detailed information on the Insurance Plan page and its importance for electronic billing	Administrative, Billing
Prime Suite Beginner to Intermediate: Billing Setup – Charges and Claims	**What:** Learn about billing setup – charges and claims. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Access and define areas in the Charges page • Create Patient List filters to verify what visits are ready to bill • Utilize Superbill functionality for updating prior to posting • Perform steps for manual posting of Charges • Understand purpose of Charge Edits • Acknowledge appropriate steps for Claims Processing • Define steps for submission of claims • Access appropriate reports for submission verification	Administrative, Billing
Prime Suite Beginner to Intermediate: Billing Setup – Claims Maintenance and Understanding Account Information	**What:** Learn about billing setup – claims maintenance and understanding account information. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Access and define areas in the Claims Maintenance page • Create and utilize filters to find outstanding claims • Perform claims corrections and resubmissions • Determine reporting needs and preferences for tracking of resubmissions • Verbalize the importance of this process as it relates to overall denial management • Review and create Account Information filters • Understand the levels of information available for each transaction type • Understand the actions available for each transaction type • Service line transfer a payment to a different category • Use the Collections History tab • Use the Credit Details tab • Perform a refund • Generate the Account Information Report for a patient’s year to date services	Administrative, Billing, Front Desk

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Prime Suite Beginner to Intermediate: Billing Setup – Effective Payment Posting and Balancing	**What:** Learn about billing setup – effective payment posting and balancing. **Takeaways:** After this session, the expectation is you will return to your practice able to review and modify your current A/R configuration, post insurance payments manually and using ERA, understand statement generation, post patient payments, and balance daily and monthly effectively.	Administrative, Billing, Front Desk
Prime Suite Beginner to Intermediate: Billing Setup – Handling Patient Balances	**What:** Learn about billing setup – handling patient balances. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Review and verify that your patient statement creation process is the most financially effective • Complete a collections questionnaire • Perform setup of Collections Admin components, Configuration, Qualification, Worklists, and Actions/Results • Set up Collections List Desktop components for staff to access their worklist(s) • Access and review patients' Collection History • Generate reports to determine accounts that should be placed in collections	Administrative, Billing
Prime Suite Beginner to Intermediate: Chart Setup – Care Provider Setup	**What:** Learn about Prime Suite chart setup – care provider setup. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Create a care provider in Prime Suite • Verify appropriate user rights are assigned by group or individually • Complete User Settings Admin for a care provider • Perform eRx configuration • Access and understand System Defaults -> Chart Tab functionality • Determine need for create note on behalf of functionality and setup	Administrative, Clinical
Prime Suite Beginner to Intermediate: Chart Setup – ROS and PE Admin	**What:** Learn about Prime Suite chart setup – ROS and PE admin. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Access Review of System Admin • Import Review of System (ROS) master file, if appropriate • Update or edit ROS, overview of use of ROS at point of care • Access Physical Exam Admin • Import Physical Exam (PE) master file, if appropriate • Update or edit PE • Create PE Types for specific charting needs • Overview of use of PE and PE Type use at point of care • Export ROS or PE master files for sharing	Clinical

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Prime Suite Beginner to Intermediate: Chart Setup — Template Administration	**What:** Learn about Prime Suite chart setup — template administration. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Create a template library — import templates, browse the library, organize your library, update/edit templates, and share with others • Understand use of templates at point of care — Note types	Administrative, Clinical
Prime Suite Beginner to Intermediate: Chart Setup — Vocabulary Admin/Reconciliation and Flowsheets	**What:** Learn about chart setup — vocabulary admin/reconciliation and flowsheets. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Describe the uses for the Vocabulary Administration and Vocabulary Reconciliation pages in Prime Suite • Customize clinical terminology and manage order and result concepts • Organize clinician-friendly terms to be used at point of care and with various interfaces/devices • Map codes from a data source facility to orders and result concept definitions to be utilized with flowsheets and point-of-care results	Clinical
Prime Suite Beginner to Intermediate: Clinical Workflow — Chart Correspondence	**What:** Learn about clinical workflow — chart correspondence. **Takeaways:** After this session, the expectation is you will return to your practice able to import and modify correspondence templates/letterhead, print correspondence letters for patients, access, and print CCDs and CCDA.	Clinical
Prime Suite Beginner to Intermediate: Clinical Workflow — Managing Clinical Documentation	**What:** Learn about clinical workflow — managing clinical documentation. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Understand the options to locate notes that have been created and are awaiting completion • Know how to access and easily navigate the template library • Know how to open and complete a chart note from scratch (understanding each note type) • Understand the tools within the note: creating a correspondence, a task, or referral from within the note	Clinical
Prime Suite Beginner to Intermediate: Clinical Workflow — Setup for Efficient Use of Patient Chart, and Navigating the Chart	**What:** Learn about Prime Suite clinical workflow — setup for efficient use of Patient Chart and navigating the chart. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Set up User Settings to fit specific needs for individual users based on role • Utilize the patient list to successfully access the patient chart and track the status of the patient during appointments • Customize Facesheet for efficient workflow • Modify Task filters to organize and prioritize work items • Use the Facesheet to add medications, problems, and vitals to a patient chart • Import templates into the note for uniformity • Create notes on behalf of providers to improve workflow	Clinical

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Prime Suite Beginner to Intermediate: Clinical Workflow — Setup for New Clinical Users	**What:** Learn about clinical workflow — setup for new clinical users. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Understand how to set up and link a new care provider to a user • Know how to set up the individual user settings for chart setup and system defaults for user management • Know how to organize the chart setup for Facesheet and template library • Understand how to set up the desktop and patient list for the care provider	Clinical
Prime Suite Beginner to Intermediate: Clinical Workflow — Understanding Orders, Results Entry, Flowsheets, and Vocabulary	**What:** Learn about clinical workflow — understanding orders, results entry, flowsheets, and vocabulary. **Takeaways:** After this session, the expectation is you will return to your practice able to identify the relationship between orders and results in a flowsheet, reconcile lab terms to vocabulary concepts, create Orders Favorites and share with users, and customize Orders Tracking to monitor Lab results.	Clinical
Prime Suite Beginner to Intermediate: Front Desk Workflow — Part 1: Patient Registration and Scheduling	**What:** Learn about front desk workflow — Part 1: patient registration and scheduling. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Complete Patient Registration and understand best practices • Understand Person vs Patient • Use and manage "Inactivating a Patient" • Understand the system-wide workflow impacts of Patient Registration • Access and use the Schedule Wizard • Access and use Drag and Drop Scheduling • Understand the effects of these changes on Prime Suite functionality	Front office
Prime Suite Beginner to Intermediate: Front Desk Workflow — Part 2: Check-in/Check-out Process and Bonus Tips	**What:** Learn about front desk workflow — Part 2: check-in/check-out process and bonus tips. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Verify and update patient information prior to check-in • Check Eligibility prior to check-in • Post co-pay at time of check-in • Balance at EOD • Understand the effects of these changes on functionality within Prime Suite • Attach Referral/Authorization to a visit • Track a patient through your office • Maximize your Patient List options • Understand the effects of these changes on functionality within Prime Suite	Front office

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Prime Suite Beginner to Intermediate: General Setup — Part I	**What:** Learn about Prime Suite general setup — Part 1. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Create/manage users and rights (individual and group) • Review all system defaults for appropriate setup related to office workflows • Create and manage locations • Acknowledge purpose of communications page • Access and utilize Employers page for maintenance of appropriate information (especially for workers' comp) • Understand the effects of these setup areas within Prime Suite functionality	Administrative, Billing, Front Office
Prime Suite Beginner to Intermediate: General Setup — Part II	**What:** Learn about Prime Suite general setup — Part 2. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Plan and manage Patient Tracking Admin efficiently • Utilize Task List Admin for the creation of new tasks to assist with workflows • Create or clean up Visit Types, if needed, and understand reports that utilize these categories • Determine appropriate uses of Utilities found within Help System Settings menu	Front Office
Prime Suite Beginner to Intermediate: General Setup — Registration Menu	**What:** Learn about Prime Suite general setup — Registration Menu. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Access and manage Referral Management Admin • Set up and manage Patient Flags Administration • Use Flag Management functionality • Prepare Prime Suite to perform eligibility checks	Billing, Front Office
Prime Suite Beginner to Intermediate: General Setup — Schedule Menu	**What:** Learn about Prime Suite general setup — Schedule Menu. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Access and manage Schedule Admin • Access and manage Rules Admin • Access and Manage Locations Admin, if needed • Understand importance of all Schedule components • Create Quick Search Templates • Create Combo Appointments	Administrative, Front office
Prime Suite Beginner to Intermediate: Billing Setup — Managing Codes and Contracts	**What:** Learn about billing setup — managing codes and contracts. **Takeaways:** After this session, the expectation is you will return to your practice able to do the following: • Access, review, and update Procedures information: Procedure List Maintenance, Single Procedure Maintenance, Procedure Explosion Maintenance, Revenue Category Configuration, and Charge Schedule Admin • Access, review, and update Contracts/Fee Schedules • Recognize the benefits of code cleanup and management • Assess the need for Charge Edits • Perform the appropriate setup steps	Administrative, Billing

Technical Q&A — Prime Suite IT Roundtable	**What:** Join us to network with other IT individuals and clients in an open-style forum. Greenway technical support representatives will discuss Greenway technology updates and answer questions regarding the Prime Suite platform and its required infrastructure. **Takeaways:** Understand product updates on Prime Suite and its required infrastructure.	Administrative, Clinical, Front office, IT

Session category: Revenue cycle optimization		
Course title	**Description**	**Audience (by role)**
Insurance Workflows and Tips (Prime Suite)	**What:** This session will cover how to identify top reasons for claim rejections/denials and educate on best practices, as well as how to stay up to date on new changes to billing requirements. **Takeaways:** Understand the top reasons why your claims are being rejected/denied, learn how to stay up to date on billing requirements, understand changes to the 2021 E/M guidelines, get recommendations on how to stay up to date on changes.	Administrative, Billing, Front Office
Revenue Cycle Best Practice: Strategy in AR Reporting — Setup and Impact to Data (Prime Suite)	**What:** This presentation will help identify the story behind KPIs and industry benchmarks, empowering positive impacts on efficiency and revenue. Additionally, we will cover best practices to achieve thoughtful organization of procedure codes, finance groups, carrier/plans, finance centers, profiles, and more. **Takeaways:** Learn best practices for daily, weekly, monthly, and year-end reporting, the meaning behind certain KPIs and industry benchmarks, and how to leverage reports to improve workflows, as well as to set and track goals.	Administrative, Billing, Front Office