



Blueprint Solutions

Training Checklist For: _____

Clinic Name: _____

Video Number	Video Title Name	Initial when Complete
1	Navigate Blueprint OMS	
2	Create a New Patient	
3	Create a New Appointment	
4	Add Hearing Aids	
5	Order New Hearing Aids	
6	Receive Hearing Aids	
7	Deliver/Invoice Hearing Aids	
8	Repair Hearing Aids	
9	Return Hearing Aids	
10	Journal	
11	Audiology	
12	Patient Insurers	
13	Patient Marketing Tab	
14	Marketing Module	
15	Quick Sale	
16	Void Invoice	
17	Apply Payments to Multiple Invoices	
18	Unapply Payments and Credits	
19	Return Credits	
20	View Open Balances	
21	Enter Bank Deposits	

22	Noah Integration	
23	Drop-Down Menus	
24	Order Stock Aids	
25	Manage Inventory	
26	Return Stock Aids	
27	Document Management	
28	QuickBooks/Blueprint Integration	
29	Setup Menu	
30	Setup Menu – Repair, Event Types	
31	Patient Summary Screen	
32	Audiology Report	
33	Schedule Availability	
34	In Clinic Monitor	
35	Reprint Receipt	
36	Utilize 3 rd Party Billing – Edit Insurer Coverage	
37	Generate HCFA 1500 Form	
38	Issue Credit	
39	User Administration	
40	Manage Templates	
41	Manage Templates – Default Signatures	
42	Email/Fax	
43	Printing Address and Next Appointment Labels	
44	Managing Recalls	
45	V2.2.9 Schedule	
46	Edit hearing aid details	
47	3 rd party ledger	