



# Blueprint Solutions

Training Checklist For: \_\_\_\_\_

Clinic Name: \_\_\_\_\_

<b>Video Number</b>	<b>Video Title Name</b>	<b>Initial when Complete</b>
1	Navigate Blueprint OMS	
2	Drop-Down Menus	
3	Setup Menu	
4	User Administration	
5	Schedule Availability	
6	Create a New Appointment	
7	In Clinic Monitor	
8	Create a New Patient	
9	Patient Summary Screen	
10	Audiology	
11	Journal	
12	Patient Insurers	
13	Patient Marketing Tab	
14	Quick Sale	
15	Add Hearing Aids	
16	Edit Hearing Aid Details	
17	Order New Hearing Aids & Items	
18	Receive Hearing Aids	
19	Deliver/Invoice Hearing Aids	
20	Send Hearing Aids for Repair	
21	Return Hearing Aids	
22	Order Stock Aids	
23	Return Stock Aids	
24	Return Credits	
25	Issue Credit	
26	View Open Balances	
27	Apply payments to Multiple Invoices	
28	Un-apply Payments and Credits	
29	Void Invoice	
30	Enter Bank Deposits	
31	Marketing Module	



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32	Noah Integration	
33	Manage Inventory	
34	Document Management	
35	Quickbooks/Blueprint OMS Integration	
36	Managing Recalls	
37	Audiology Report	
38	Reprint Receipt	
39	3 <sup>rd</sup> Party Ledger	
40	Utilize 3 <sup>rd</sup> Party Biling	
41	Generate HCFA 1500 Form	
42	Email/Fax	
43	Manage Templates	
44	Manage Templates- Default Signatures	
45	Integrated Credit Card Processing	
46	Printing Address and Next Appointment Labels	
47	Canadian Insurance	
48	PQRS Reporting (US only)	

**Please fax to: (888) 261-0520 when complete Or scan and email to support@blueprintsolutions.us – Thank you.**