

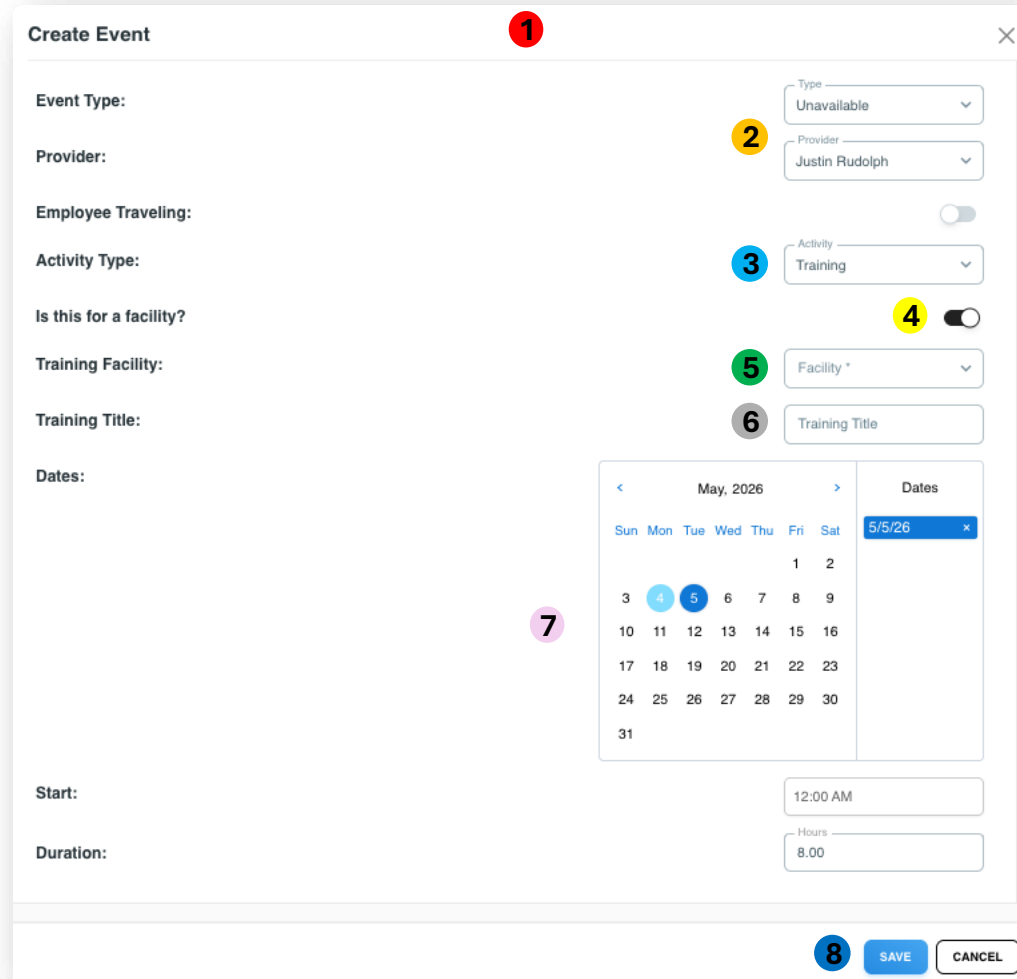
# Create and Track Training Events

Date: 5/4/2026

# Create Provider Training

## 1. Create Provider Training

- 1 • Within the **Scheduling Manager** select the user that you are creating training for and a **Create Event popup** will appear
- 2 • Under **Event Type** select **Unavailable** and make sure **Provider** is correct
- 3 • Under **Activity Type** select **Training**
  - A few new items will appear:
    - 4 • **If this is for a facility** the toggle should be on (toggle off if not)
    - 5 • Add **Training Facility** for the location
    - 6 • Add **Training Title** for what they are being trained on
- 7 • Fill out the rest of the information: **Dates, Start Time and Duration**
- 8 • Hit **Save**
  - Once saved the provider will see this event be added to their **Calander** on the provider app



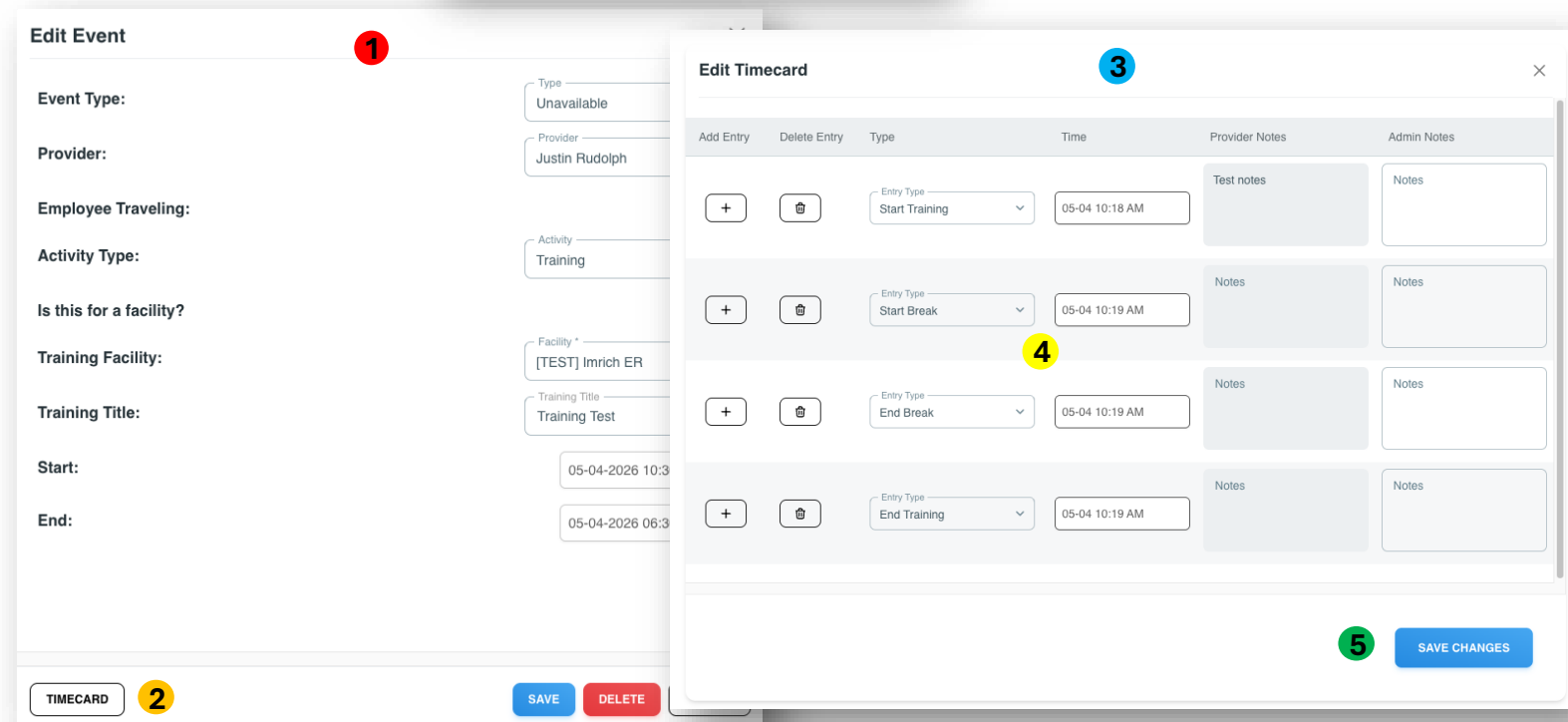
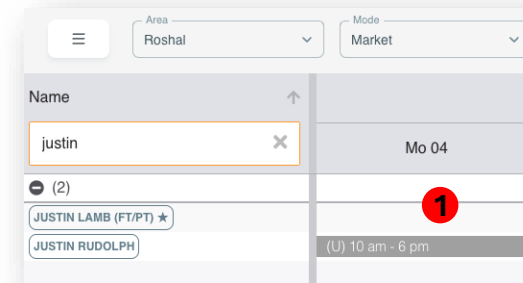
The screenshot shows the 'Create Event' form with the following fields and callouts:

- 1** (Red circle): Title of the form.
- 2** (Yellow circle): 'Event Type' dropdown menu set to 'Unavailable'.
- 3** (Blue circle): 'Activity Type' dropdown menu set to 'Training'.
- 4** (Yellow circle): 'Is this for a facility?' toggle switch, which is turned on.
- 5** (Green circle): 'Training Facility' dropdown menu set to 'Facility \*'.
- 6** (Grey circle): 'Training Title' text input field containing 'Training Title'.
- 7** (Pink circle): A calendar widget showing May 2026, with the date 5/5/26 selected.
- 8** (Blue circle): 'Start' time input field set to '12:00 AM'.
- 8** (Blue circle): 'Duration' input field set to '8.00'.
- 8** (Blue circle): 'SAVE' button.
- CANCEL** button.

# View Provider Training Timecard

## 2. View Provider Training Timecard

- 1 • Within the **Scheduling Manager** select the training event under the user and double click it to open the **Edit Event** popup
- 2 • In the bottom left corner select **Timecard**
- 3 • An **Edit Timecard** popup appears that show the logs of the time punches the provider made
- 4 • You can review and modify these punches if needed
- 5 • Hit **Save Changes** once completed



# View Training Invoice Info

## 3. View Training Invoice Info

- 1 • Within the **Invoice Manager** select the correct **month** and **billing group**
- 2 • Within the **Summary** you will see **# of training hours** along with the **total cost**
- 3 • You can view the **table** below the summary for additional details on the specific order
- We only begin billing a client once they have completed more than 4 hours of training.
- In this example, the image shows **3.5 billable hours**.
  - That means there has been **7.5 total training hours** under the client, but the first **4 hours are included at no charge**. Therefore, only the remaining **3.5 hours** are billable.

Invoice Month:  1

Billing Group:

Fee Type	Training	Cancelled	Count	Amount	Total
Advance ER - Galleria	0	0	0.0	0%	\$0.00
[TEST] Alter Heart Hospital	3.5	0	3.0	100%	\$3,462.50
<b>Total</b>	<b>3.5</b>	<b>0</b>	<b>3.0</b>	<b>100%</b>	<b>\$3,462.50</b>

Stat studies @ \$200.00 each			16	\$200.00	\$3,200.00
# of Studies (1-10) @ \$320.00 each			3.0	\$320.00	\$960.00
# of Studies (11+) @ \$190.00 each			0.0	\$190.00	\$0.00
Monthly Minimum of \$3,200.00 adj					\$2,240.00
Cancellations @ \$100.00 each			0	\$100.00	\$0.00
# of Training Hours @ \$75.00 each			3.50	\$75.00	\$262.50
<b>Total</b>					<b>\$3,462.50</b>

Monthly Minimum 6 Records

FACILITY	ORDER ID	PROVIDER	MRN	PROCEDURES	TRAINING HOURS	STARTED AT LOCAL	TOTAL STUDIES	CANCELLED STUDIES
[TEST] Alter Heart Hospital	ord.166714		001	Abdomen	0	2026-04-08 11:44	1	0
[TEST] Alter Heart Hospital	ord.166778	Jonathan Alter	111	NEW2, April Training 1, Title	3.5	2026-04-14 00:00	0	0
[TEST] Alter Heart Hospital	ord.166778		111	Echocardiogram	0	2026-04-21 12:01	1	0
[TEST] Alter Heart Hospital	ord.166794		005		0	2026-04-29 10:52	1	0
[TEST] Alter Heart Hospital					3.5		3	0
<b>Grand Total</b>					<b>3.5</b>		<b>3</b>	<b>0</b>



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