

BUSINESS MODEL SOFTWARE

Human Resources: Recommended Training Course Agenda

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how to more efficient manage your payroll, applicants, employees and other information through the software. The sequence of courses can be changed based on training needs; however the content of each course should remain as stated.

Recommended Course Attendees: Owners, HR, Administrators, and any other Upper Level Management



 $\mathbf{U}: 1$ hour 45 minutes

	COURSE DESCRIPTION	
All Reference Files	Adding and editing payers, physicians, providers, facilities and other necessary information to efficiently use the software.	30 Minutes
Adding in a New Applicant & Applicant Tracking	Learn how to manage an applicant's resume information from start to finish.	15 Minutes
Converting an Applicant to an Agent	Learn how to create an new agent account from an existing applicant.	5 Minutes
Creating User Security Groups	You will learn how to set up various security groups for you agency based on the job responsibilities.	10 Minutes
Setting Up a New Agent with Username and Password	How to create a new agent within the software.	10 Minutes
Adding an Agent's Licenses, Pay Rates, & E-Records	How to enter and track agent license information, pay rates and other important information.	10 Minutes
Adding a New User	How to create a new user within the software.	5 Minutes
Resetting Passwords (Administrators only)	How to reset current user passwords.	5 Minutes

nd **BUSINESS MODEL SOFTWARE**

IMPORTANT TIPS TO SHARE:

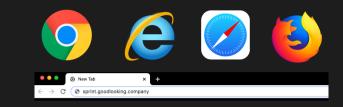
- Explain what attributes are and real examples of how they can be used.
- Explain how to set up a username and password from the agent screen.
- Go over Security Groups in detail and help them set up new groups if needed.
- This course content may not be applicable to all office locations. Please consult with your administrator to determine if training on this subject is needed.

Initial User Set-Up: Logging In

1

Open your web browser and go to the URL.

• Open your browser and go to http://sprint.goodlooking.com





Initial Credentials

- In the username field, type in the email you gave to receive the GoodLooking software technology
- In the **password** field, use the temporary PW given to you



	GoodLooking
÷	Username
07	Password
	Log In



Choose a new password.

 Once you are directed into the software, it will prompt you to create a password. At this time, you will enter what your individual password will be which will use moving forward when you login to the system.

Update Pa	issword	×
	Old Password:	
Your pass sENsitIVE	word must be between 8 and 20 characters.	. Passwords are CaSe
	New Password:	
с	onfirm Password:	
Cancel		Submit



Your Account Is Active.

 Once you have finished setting up your log-in, you should be directed to your home platform page. You have successfully logged into your GoodLooking Software Account.

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Change Company Terminology

1

Go to 'Settings' Tab • On your home page,

click the 'Settings' tab at the top tool bar.





Global Settings ----- Terminology

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Terminology' option.

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	Terminology
	Payment & Subscription Settings
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Complete the Form

- A 'Company Terminology' Form will open up.
- Complete the form with the necessary fields. Don't Forget to click 'Save'.

Company Terminology			×
Office:	Office	(ex Provider, Office, Branch, Location)	
Client:	Client	(ex Patient, Client, Customer)	
Employee:	Employee	(ex Agent, Provider, Employee, Contractor)	
Contract Period:	Contract Period	(ex Episode, Certification Period)	
Manager:	Business Advisor	(ex Case Manager, Social Worker)	
Agent 1:	Agent 1	(ex Primary Clinician)	
Agent 2:	Agent 2		
Agent 3:	Agent 3		
Agent 4:	Agent 4		
Agent 5:	Agent 5		
Agent 6:	Agent 6		
CRM:	CRM		
Contract:	Admission Documents		
Case Level:	Level	(ex Case Level, Skill Level)	
Projects:	Project	(ex Plan of Care, Projects)	
Task:	Change Order	(ex Physician Order, Change Order)	
Cancel		Save	



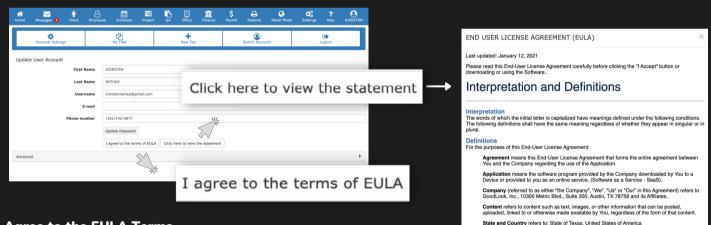
Change Personal Settings

Go to 'Settings' Tab • On your home page,	A Home	Messages	Client	Employee	Schedule	Project	QA	Office	finance	\$ Payroll	Reports	😵 Travel Mode	Settings	? Help	
click the 'Settings' tab at the top tool bar.											Sett	· · · ·			
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Global Settings		>	
Payroll Settings		>	
Security		>	
Lists		>	↓
Advanced	Personal Settings		
Tools			
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View the EULA Terms

• On the Update User Account page, you must agree to the terms before you can make any changes. To view the agreement choose the "Click here to view the statement' button and the EULA form will open.





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Agree to the EULA Terms

• Once you have read the terms of the agreement, you can either click on 'Accept' at the bottom of the form or click out of the form and click 'I agree to the terms of EULA.' on the preferences page.

Go to 'Advanced'

 Now that we have agreed to the terms. we can move forward with updating your preferences. Click on the Advanced options and a drop down list will open.

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		Employee Code	Category
		Employee Name	🗅 Туре
		Time	Notes
		Collapsed	Employee/Client Verification
	Default Agent License Display	License #/Policy	D Note
		Issue Date	 Days Until Expiration
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		Exam Score	 Date Hiring Requirements Were Met
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		Required For Scheduling	Ø # OF Scheduling Licenses Not Met
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		Click here to update color schemes, font, and font sizes	



6

Choose your Display Preferences

• Within the list, you will see different display options you can pick and choose from. Simply click on the items you would like to include in your main display so the box is filled with a blue checkmark

Advanced			*		
Default Schedule Display	Recipient Name	O Service			
	Employee Code	Category			
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	 Time 	Notes			
	 Collapsed 	Employee/Client Verification	Default Schedule Display		
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	 Expiration Date 	Entered By			
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	Exam Score	Date Hiring Requirements Were Met		🖉 Time	Notes
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				Issue Date	 Days Until Expiration
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				Requirement Completion Date	History
				Exam Score	Date Hiring Requirements Were Met
				Required For Hiring	# Of Hiring Licenses Not Met
				Required For Scheduling	# OF Scheduling Licenses Not Met

Update your Style Preferences

• To change your style preferences, choose the 'Click here to update color schemes, font, and font sizes' button. A 'Color Scheme Tester' page will open up.

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	 Required For Hiring 	# Of Hiring Licenses Not Met			Disabled Input	Disabled Input		Heads up! This alert needs your attention, but it's	not super importar	ot.	
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- Use the drop downs to choose from the different colors, font types and sizes.
- Once you have personalized it, don't forget to click 'Submit' on the Color Scheme Tester page and then 'Save' on the 'Preferences' page.

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	Courier New			Darkblue			
	Cursive			Darkred			
	Georgia			✓ Default			
1	Helvetica			Energy			
1	mpact			Green			
1	Lucida Console			Grey			
1	Monospace			Lilac			
	Tahoma			Linegreen			
	Times			Military			
	Times New Roman						
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				Pink			
				Purple			
				Red			
				Steel			
				Sunny			
				White			
				Yellow			

Add a Job

Client Employee Schedule Project

Home Messages

Payroll Settings

Payroll Settings Payroll Settings

Pay Periods

1

Go to 'Settings' TabOn your home page,

 Chrybur home page, click the 'Settings' tab at the top tool bar



Go to 'Payroll Settings'

 In the listed options, click on the 'Payroll Settings' drop down



Job Titles

- At the bottom of the list, click 'Job Titles'
- A page will open up listing the organization's current jobs.



Add a New Job Title

- Click the '+' icon on the far right to the search bar.
- A form page will open up.

Complete the Form

- Fill out the required fields with the lead's information.
- Don't forget to click 'Submit' on the bottom right of the form.

Payroll Departments					
Job Titles					
Job Title			×		
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CHIEF EXECUTIVE OFFICER Department: EXECUTIVE					
CHIEF OF STAFF Department: EXECUTIVE	Reports to: CHIEF EXECUTIVE OFFICER				
EXECUTIVE COORDINATOR Department: EXECUTIVE	Reports to: CHIEF EXECUTIVE OFFICER				
GENERAL Department: HR	Reports to: CHIEF OF STAFF				

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Add New Employees

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Go to 'Employee' Tab

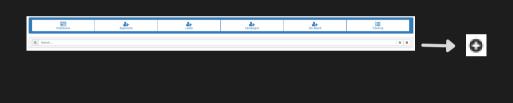
• On your home page, click the 'Employee' tab at the top tool bar





Add New Employess

- Click the '+' icon on the far right to the search bar.
- A form page will open up.





Complete the Form

- Fill out the required fields with the employee's information.
- Don't forget to click 'Save' on the bottom right of the form.

Add Employee								×
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Address		City			State	~	Zip	
Phone 1		Cell			Phone (Other)			
Email		Applicant Access	Preferred Method of Contact	~	Q. Search			
Sex Male Female	Date of Birth		Race			search		
Net Promotor Score: NaN	10	Reason						
Advanced								>
								Save

Save

Company Reference Lists

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Home



Go to 'Settings' Tab

• On your home page, click the 'Settings' tab at the top tool bar



Go to 'Tools'

In the listed options, click
 on the 'Tools' drop down



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Choose 'Import Client Referrals'

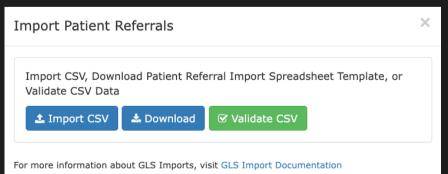
 In the Import Data List, click on the 'Import Patient Referrals' option.

Import Data	
Import Employees	
Import Employee Contacts	
Import Employee Licenses	
Import Employee Pay Rate	
Import Patients	
Import Patient Contacts	
Import Patient Referrals	
Import Offices	
Import Services Import Patie	ent Referrals
Import Service Pricings	
Import Physicians	
Import Facilities	
Import Pharmacies	



Upload your List

 The pop up will open where you can choose from Importing a CSV file, downloading the list information sheet or Validate the CSV. Once you have the information, you choose that file and upload it into the software.



Tracking Requirements: Employees

Schedule

Employ

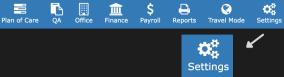
r Patient

Messages



Go to 'Settings' Tab

• On your home page, click the 'Settings' tab at the top tool bar



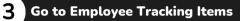
? Help

2 Lists

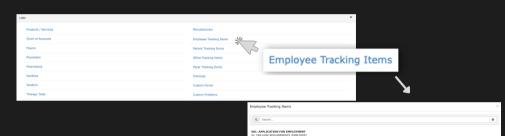
• Click 'Lists' in the settings options so a drop down opens.

Home

Personal Settings	>		Lists	>
Global Settings	>	Я	Lats	*
Payroll Settings	>		Products / Services	Manufacturers
	_		Chart of Accounts	Employee Tracking Items
Security	>		Payers	Patient Tracking Items
Lists	>	/	Physicians	Office Tracking Items
			Pharmacius	Payer Tracking Items
Advanced	>		Pacifilies	Trainings
Tools			Venders	Custom Forms
100/5	,		Therapy Tests	Custom Problems



- Click 'Employee Tracking Items' in the Lists section.
- A page will open listing all your employee tracking items.



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Add a Tracking Item

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• To add a tracking item, click the '+' button to the far right of the search bar.

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Employee Tracking Items	×			
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BR2, LIME-OFF# PROFILE D2, THE HOLE REQUIREMENTS (DVR.DFEE) D02, LICENSE VARIFICATION				

5 Complete the Add Employee Tracking Item Form

- When the 'Add Employee Tracking Item' form opens, you will select the type and complete the open fields.
- Input the Requirement settings and Components for the tracking item.
- Don't forget to click 'Submit'.

Add Emp	×						
	Form	Policy	Training	File	Product	Other	
Name:							
Category:							
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Assign To:							~
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Required f	or Sche	duling:					
YES NO	D J						
Can be con	npleted	by the E	mployee:				
YES NO	D						
Not Applic							

Only	require this item for
Office	a:
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Job T	itle:
Q	Search
Appli	cant Status:
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Com	ponents
	Exam Score
	License / Policy #
	Issue Date
	Expiration Date
	File Attachment
Can	Cel Delete Submit

Tracking Requirements: Office

Schedule

Office

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Plan of Care

Employ

Patient

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Go to 'Settings' Tab

 On your home page, click the 'Settings' tab at the top tool bar

Lists

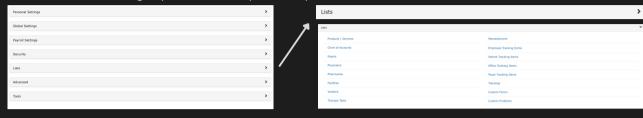
• Click 'Lists' in the settings options so a drop down opens.

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Home

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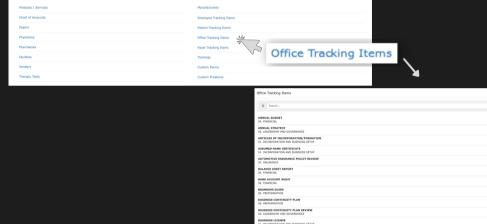
Messages





Go to Office Tracking Items

- Click 'Office Tracking Items' in the Lists section.
- A page will open listing all your patient tracking items.



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Settings

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Settings

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Help

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Reports

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Payroll



Add a Tracking Item

• To add a tracking item, click the '+' button to the far right of the search bar.



Complete the Add Office Tracking ItemsForm

Office Tracking Items

Q Search.

- When the 'Add Office Tracking Items' form opens, you will select the type and complete the open fields.
- Input the Requirement settings and Components for the tracking item.
- Don't forget to click 'Submit'.

Add Office Tracking Item
Form Policy File Product Other
Name:
Category:
← +
Assign to Employee:
Q Search
Default Expiration Date:
Not Applicable:
YES NO
Only require this item for
Office:
Q Search
Components
Exam Score
License / Policy #
Issue Date
Expiration Date
File Attachment
Cancel Delete Submit