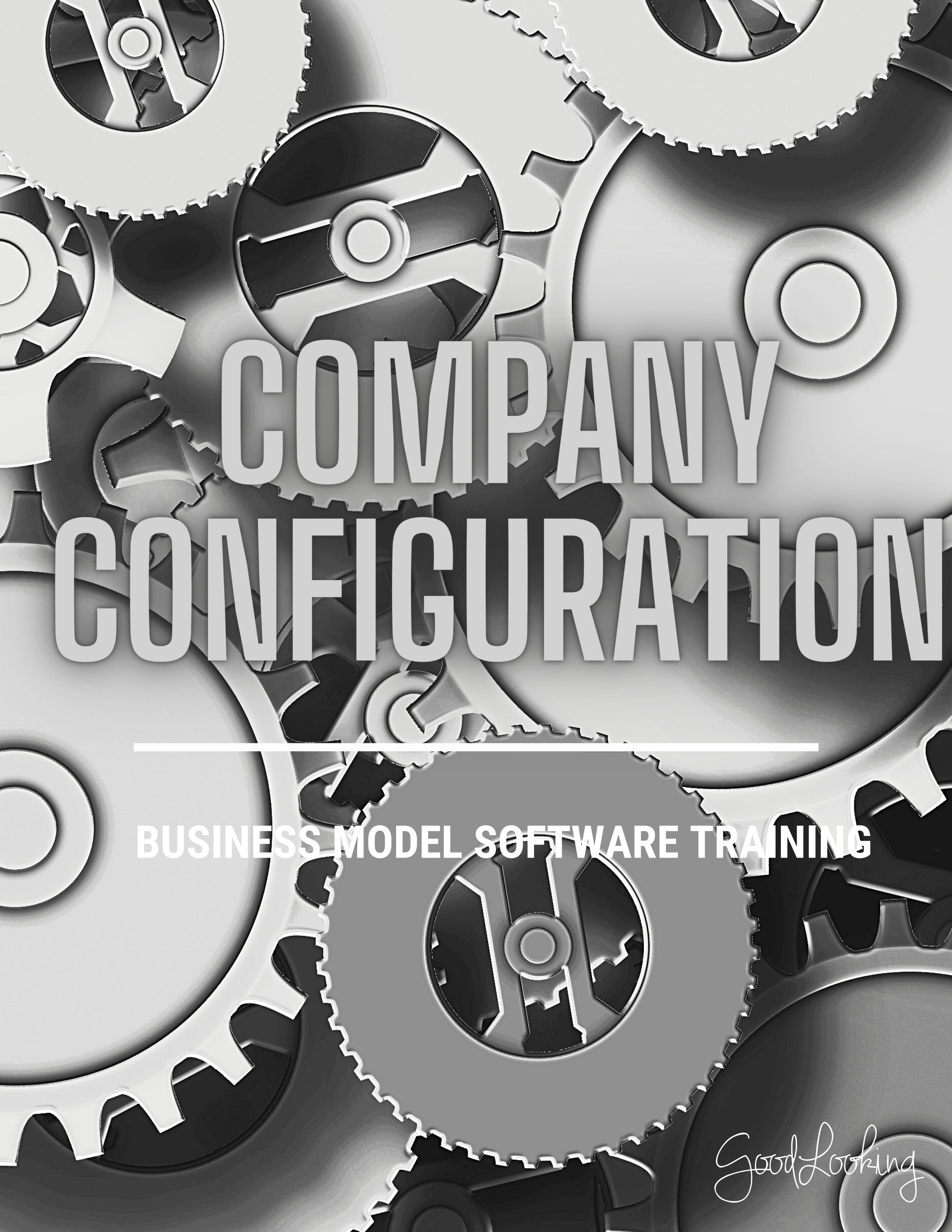


COMPANY CONFIGURATION

BUSINESS MODEL SOFTWARE TRAINING

GoodLooking

GoodLooking

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

: 1 hour 45 minutes

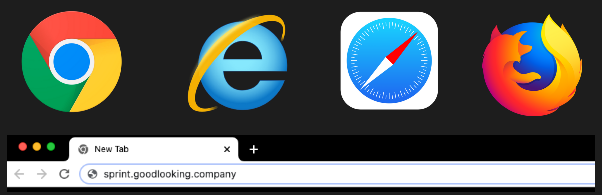
COURSE TITLE	COURSE DESCRIPTION	
All Reference Files	Adding and editing payers, physicians, providers, facilities and other necessary information to efficiently use the software.	30 Minutes
Adding in a New Applicant & Applicant Tracking	Learn how to manage an applicant's resume information from start 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

IMPORTANT TIPS TO SHARE:

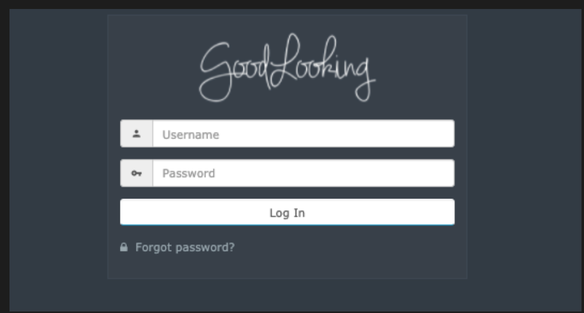
- Explain what attributes are and real examples of how they can be used.
- Explain how to set up a username and password from the agent screen.
- Go over Security Groups in detail and help them set up new groups if needed.
- This course content may not be applicable to all office locations. Please consult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

Initial User Set-Up: Logging In

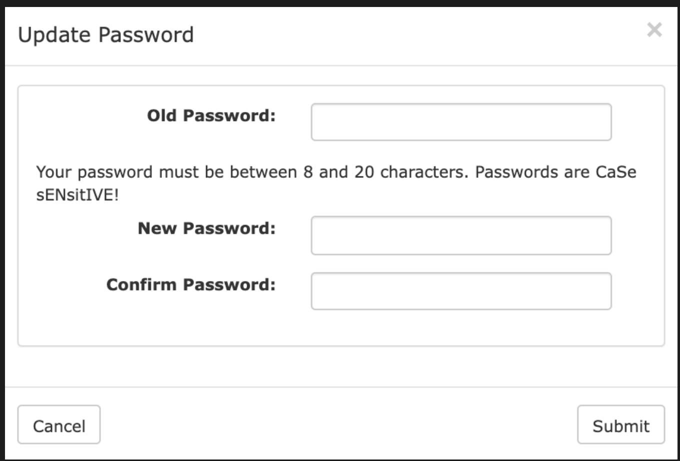
1. **Open your web browser and go to the URL.**
   - Open your browser and go to http://sprint.goodlooking.com



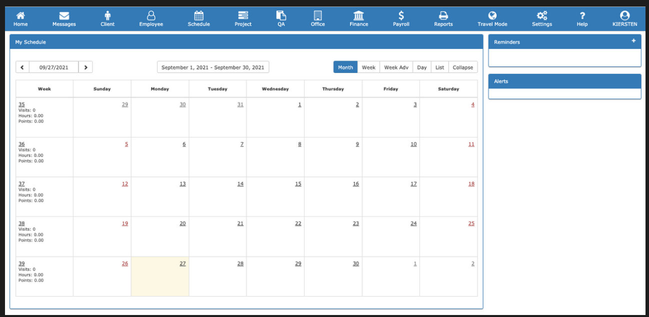
2. **Initial Credentials**
   - In the **username** field, type in the email you gave to receive the GoodLooking software technology
   - In the **password** field, use the temporary PW given to you



3. **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.



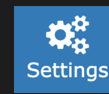
4. **Your Account Is Active.**
   - Once you have finished setting up your log-in, you should be directed to your home platform page. You have successfully logged into your GoodLooking Software Account.



Change Company Terminology

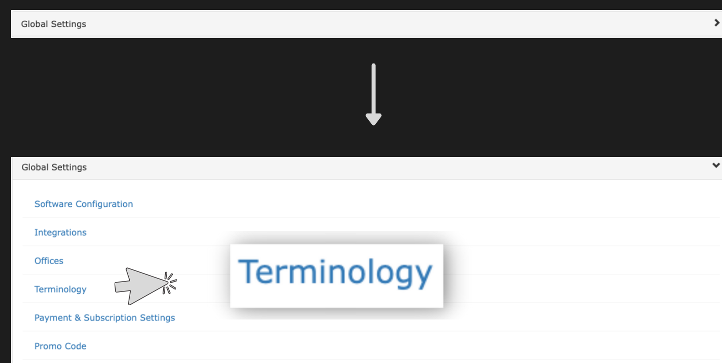
1 Go to 'Settings' Tab

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



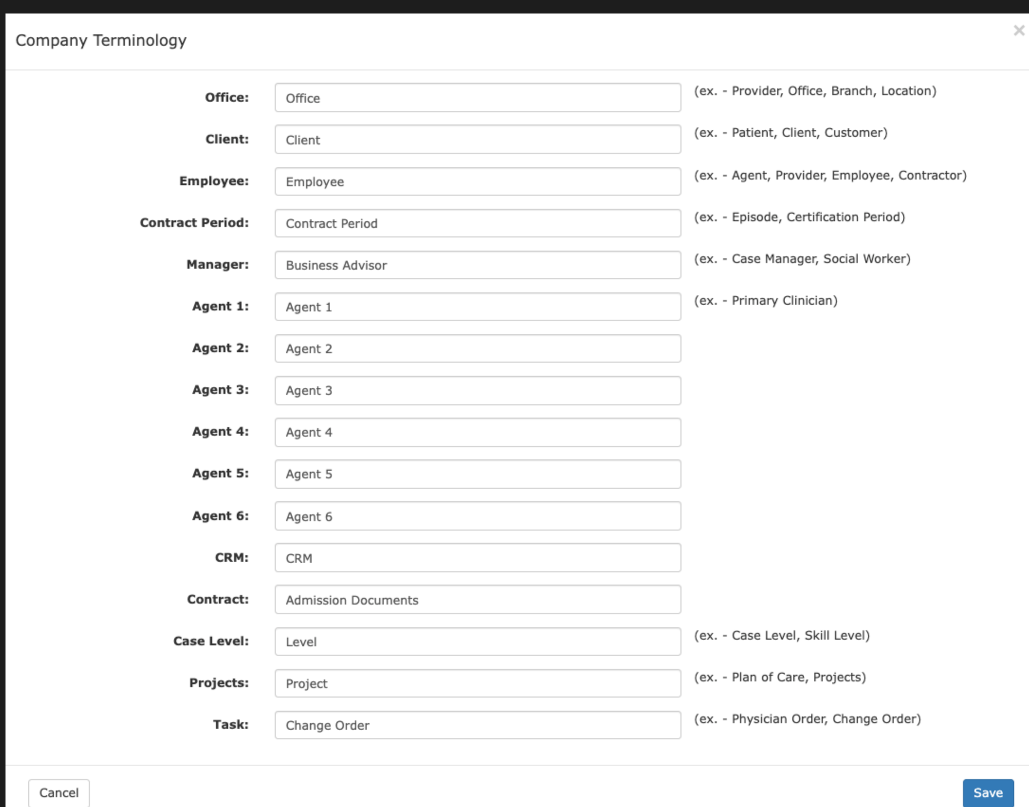
2 Global Settings ⟶ Terminology

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



3 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

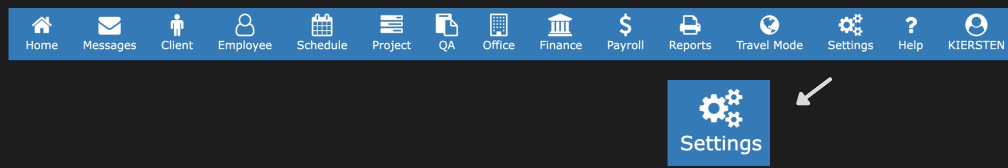
Office:	Office	(ex. - Provider, Office, Branch, Location)
Client:	Client	(ex. - Patient, Client, Customer)
Employee:	Employee	(ex. - Agent, Provider, Employee, Contractor)
Contract Period:	Contract Period	(ex. - Episode, Certification Period)
Manager:	Business Advisor	(ex. - Case Manager, Social Worker)
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

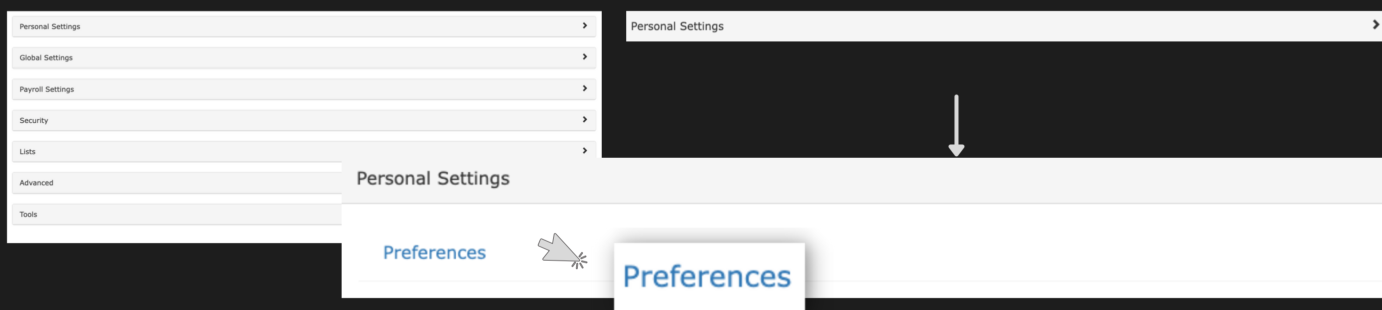
1 **Go to 'Settings' Tab**

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



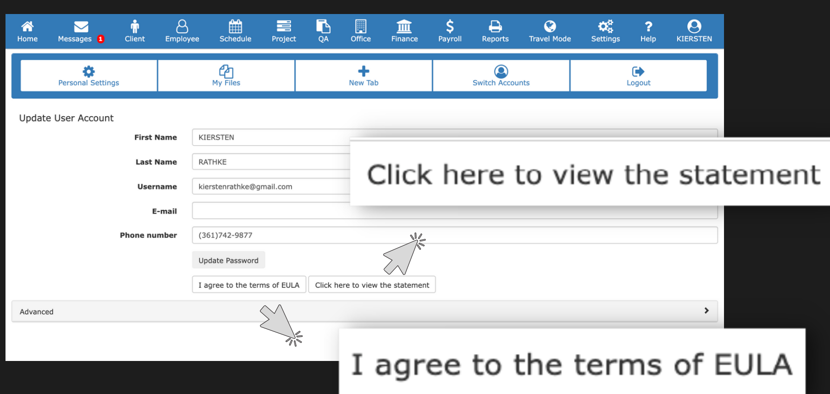
2 **Personal Settings → Preferences**

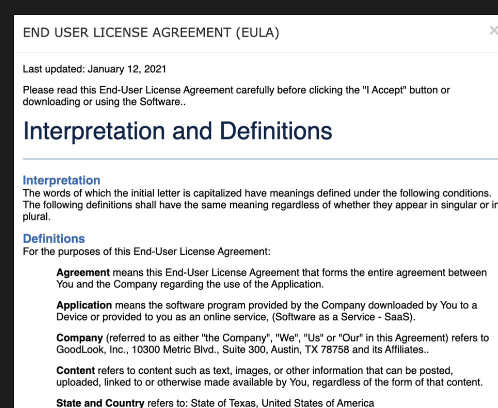
- Click "Personal Settings" in the list so a drop down opens.
- Click the 'Preferences' option.



3a **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.



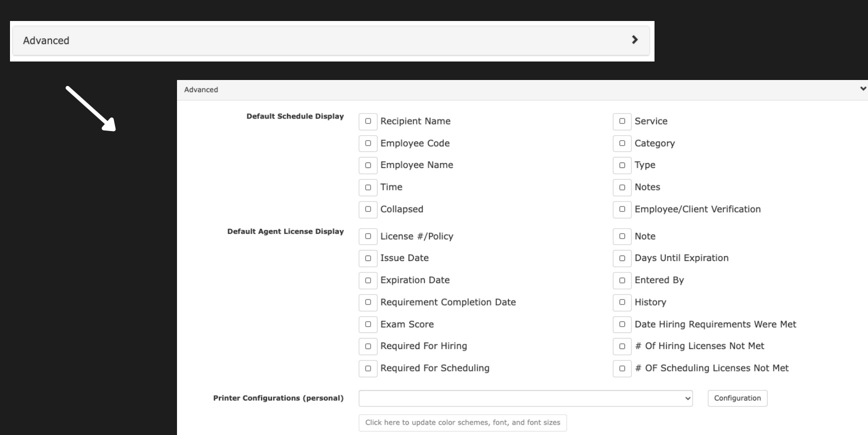


3b **Agree to the EULA Terms**

- 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.

4 **Go to 'Advanced'**

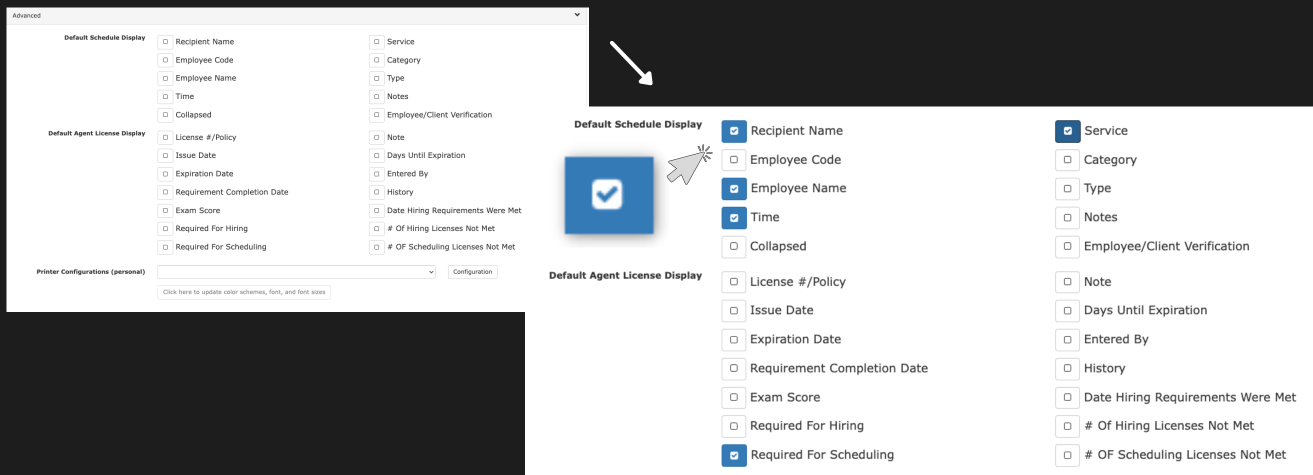
- Now that we have agreed to the terms. we can move forward with updating your preferences. Click on the Advanced options and a drop down list will open.



Change Personal Settings Continued

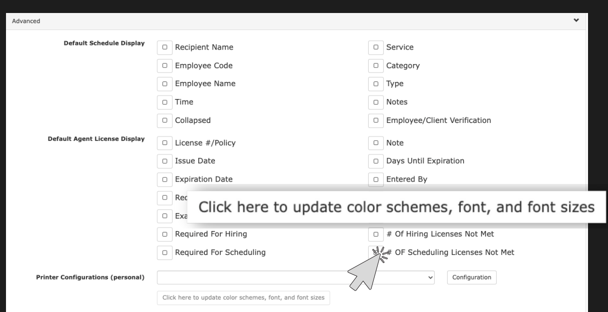
5 **Choose your Display Preferences**

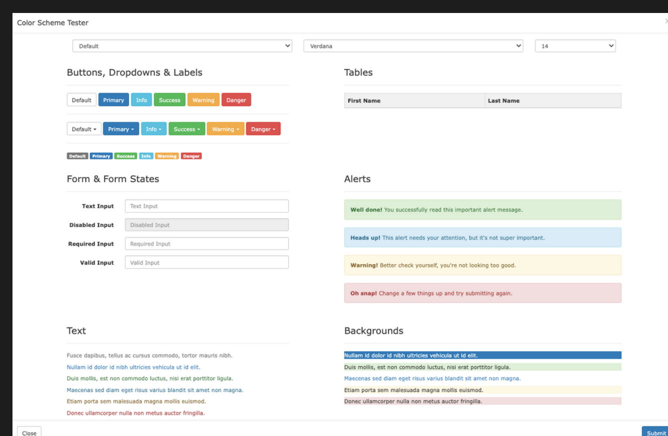
- Within the list, you will see different display options you can pick and choose from. Simply click on the items you would like to include in your main display so the box is filled with a blue checkmark



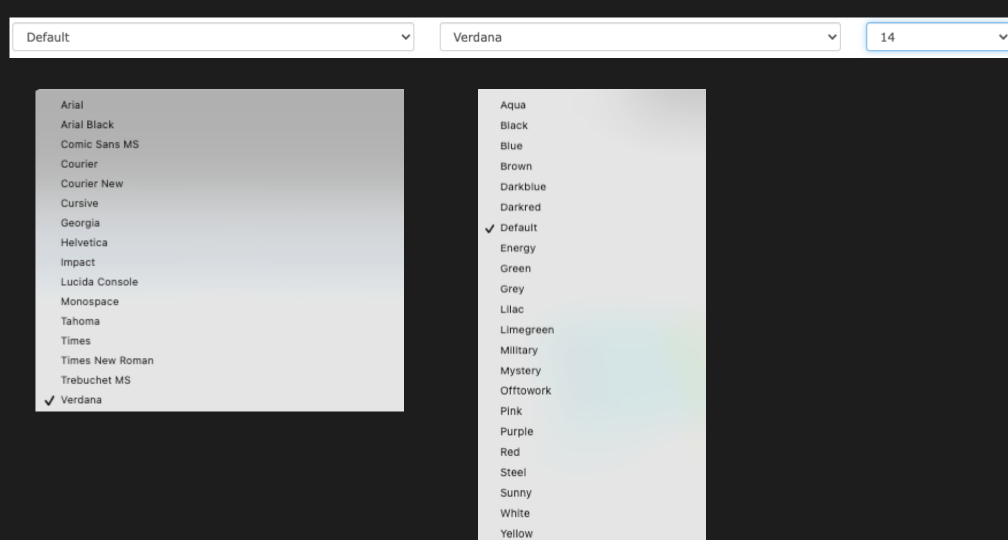
6 **Update your Style Preferences**

- 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.





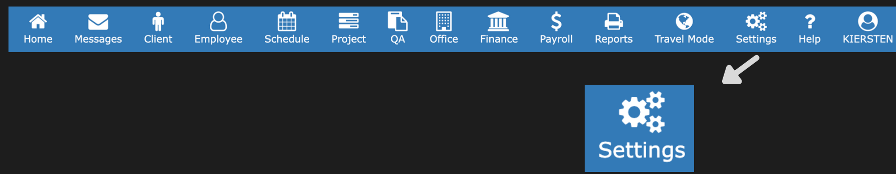
- Use the drop downs to choose from the different colors, font types and sizes.
- Once you have personalized it, don't forget to click 'Submit' on the Color Scheme Tester page and then 'Save' on the 'Preferences' page.



Add a Job

1 Go to 'Settings' Tab

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

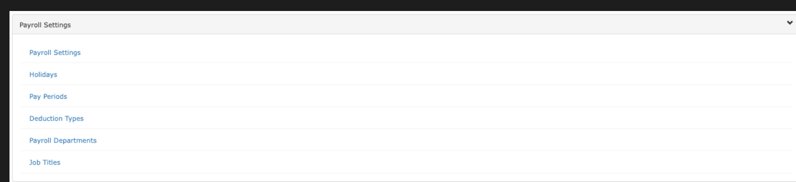


2 Go to 'Payroll Settings'

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

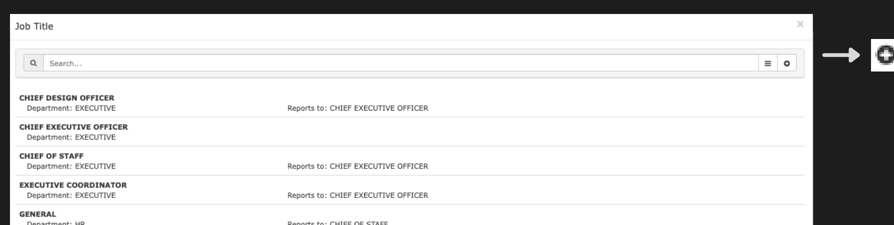
3 Job Titles

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



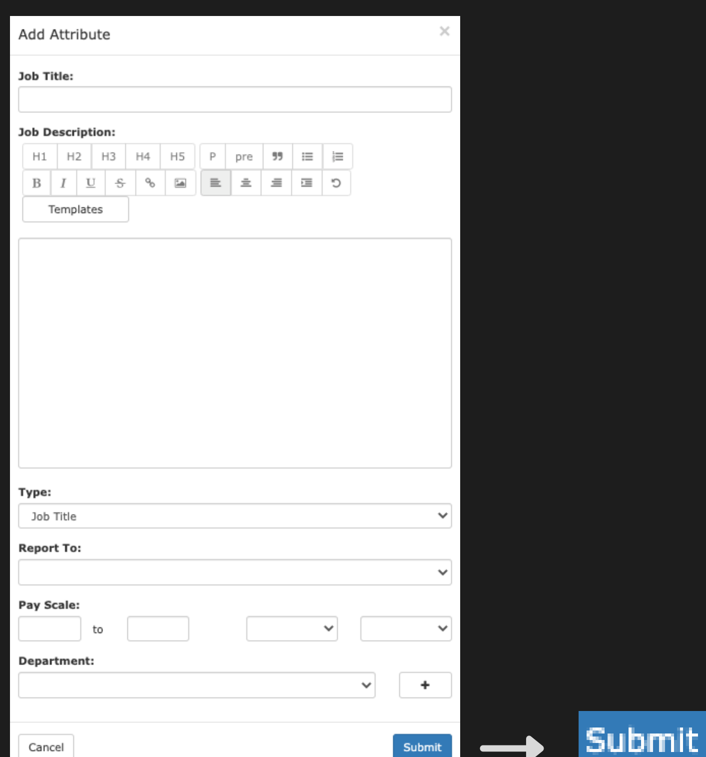
4 Add a New Job Title

- 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.

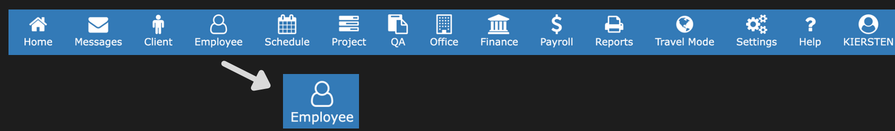


Add New Employees

1

Go to 'Employee' Tab

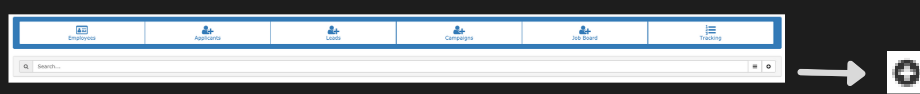
- On your home page, click the 'Employee' tab at the top tool bar



2

Add New Employess

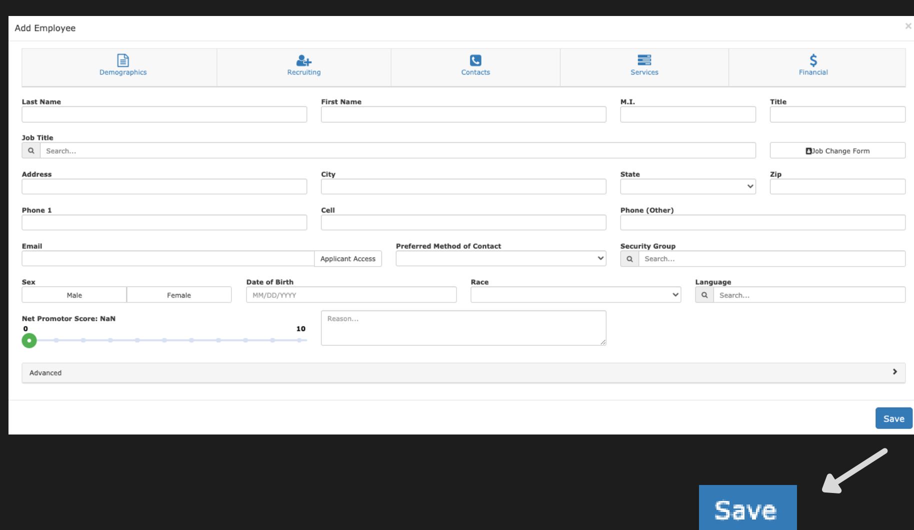
- Click the '+' icon on the far right to the search bar.
- A form page will open up.



3

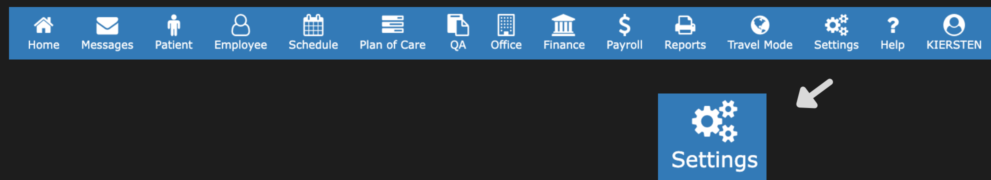
Complete the Form

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

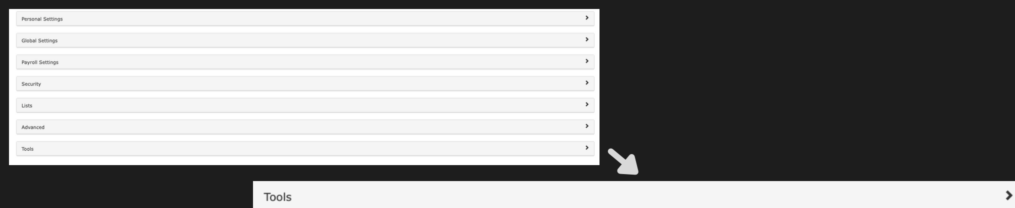


Company Reference Lists

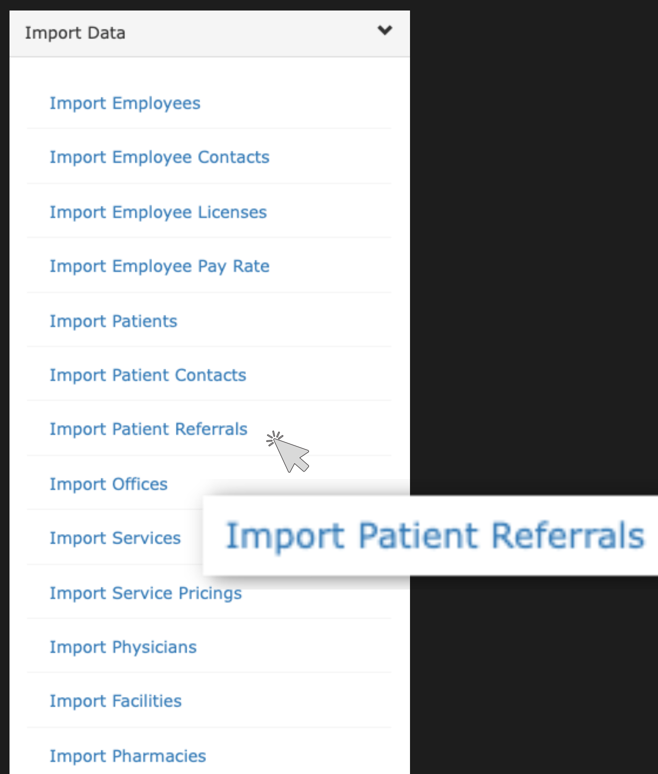
1. **Go to 'Settings' Tab**
   - On your home page, click the 'Settings' tab at the top tool bar



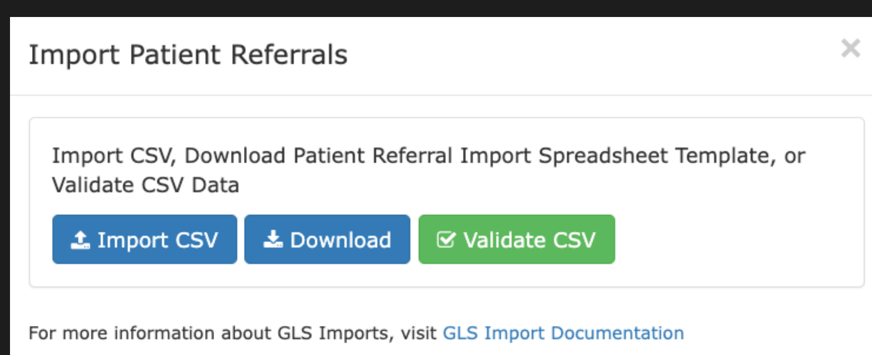
2. **Go to 'Tools'**
   - In the listed options, click on the 'Tools' drop down



3. **Choose 'Import Client Referrals'**
   - In the Import Data List, click on the 'Import Patient Referrals' option.



3. **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.

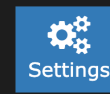


*NOTE: Use this same process for importing your company reference lists.

Tracking Requirements: Employees

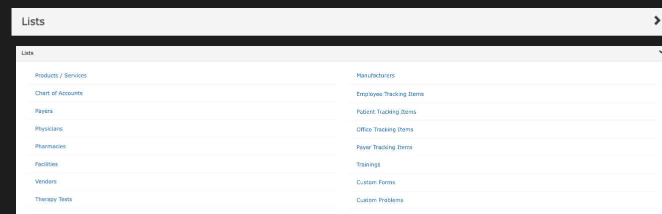
1 Go to 'Settings' Tab

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



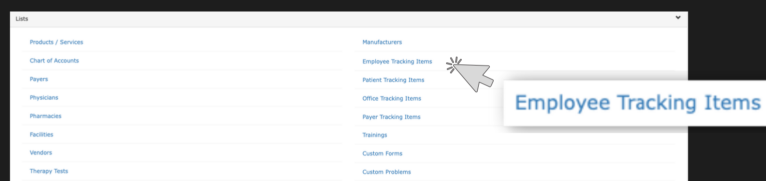
2 Lists

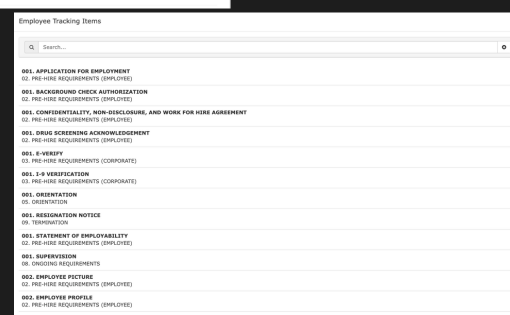
- Click 'Lists' in the settings options so a drop down opens.



3 Go to Employee Tracking Items

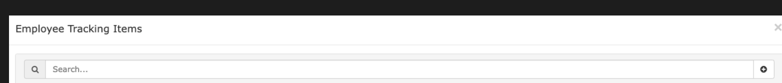
- Click 'Employee Tracking Items' in the Lists section.
- A page will open listing all your employee tracking items.





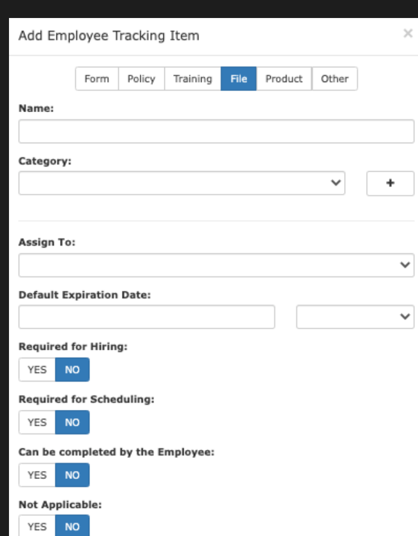
4 Add a Tracking Item

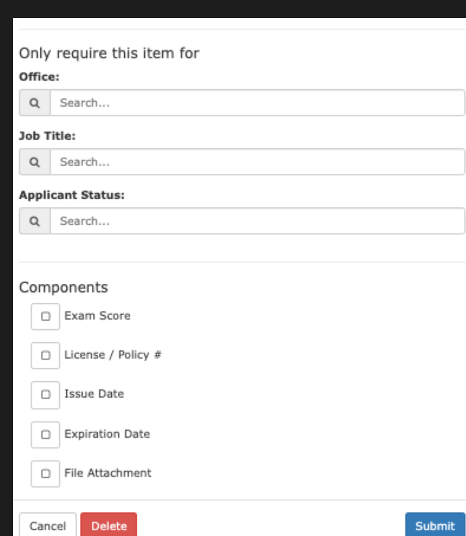
- To add a tracking item, click the '+' button to the far right of the search bar.



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'.

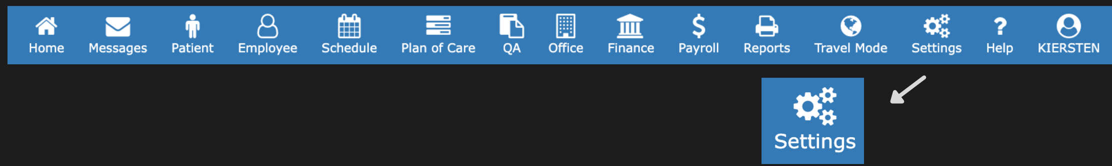




Tracking Requirements: Office

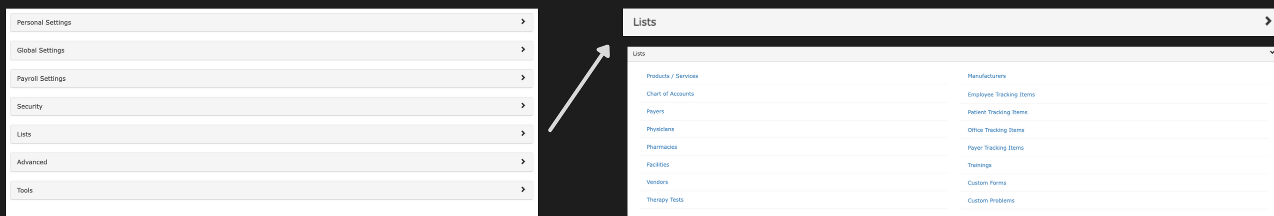
1 **Go to 'Settings' Tab**

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



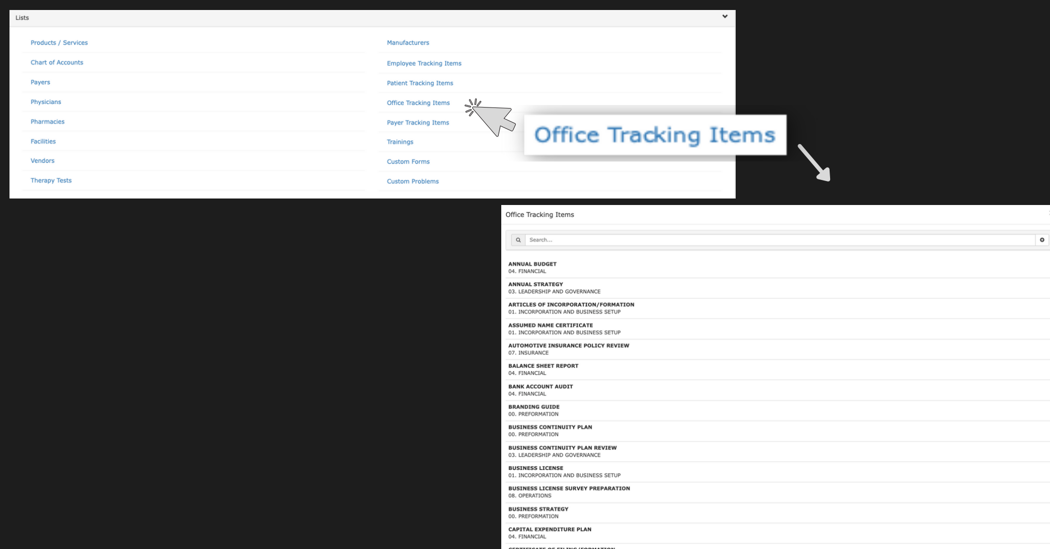
2 **Lists**

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



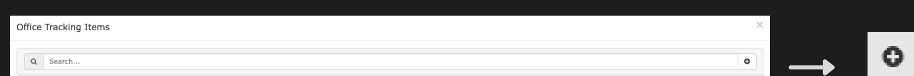
3 **Go to Office Tracking Items**

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



4 **Add a Tracking Item**

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



5 **Complete the Add Office Tracking ItemsForm**

- 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'.