6/25/2020 Agenda:

7:30am – 8:30am (Andy and Terry)

- My Team
  - Create users
- Config Panel
  - Create Event Types
  - Create Referral Partners
  - Create Program Types
- Manage Templates
  - How to download
  - Activate/deactivate
  - Create documentation template

  Post meeting, Clarity to download from pre-built list of templates to review and select for initial usage.

8:30am – 10:00am (All Team)

- Logging in
- Quick overview of view event page
  - Demographics
  - View events
- Calendar View
  - Search for patient
  - Create event
  - Patient Lookup
- Calendar view follow-ups
- Time Report
- Template Report

  Post meeting, Clarity to provide demo account logins. CCM team to review support center and may start exploring demo account.

6/26/2020 Agenda:

8:00am – 9:30am

- Starting workflow
  - Ensure that patient exists is practice
  - Enrollment – initial event and CCM Master Consent Notification Template
- Get Your Health Record Enrollment and Data Sharing
  - How to enroll
  - How to turn on data sharing