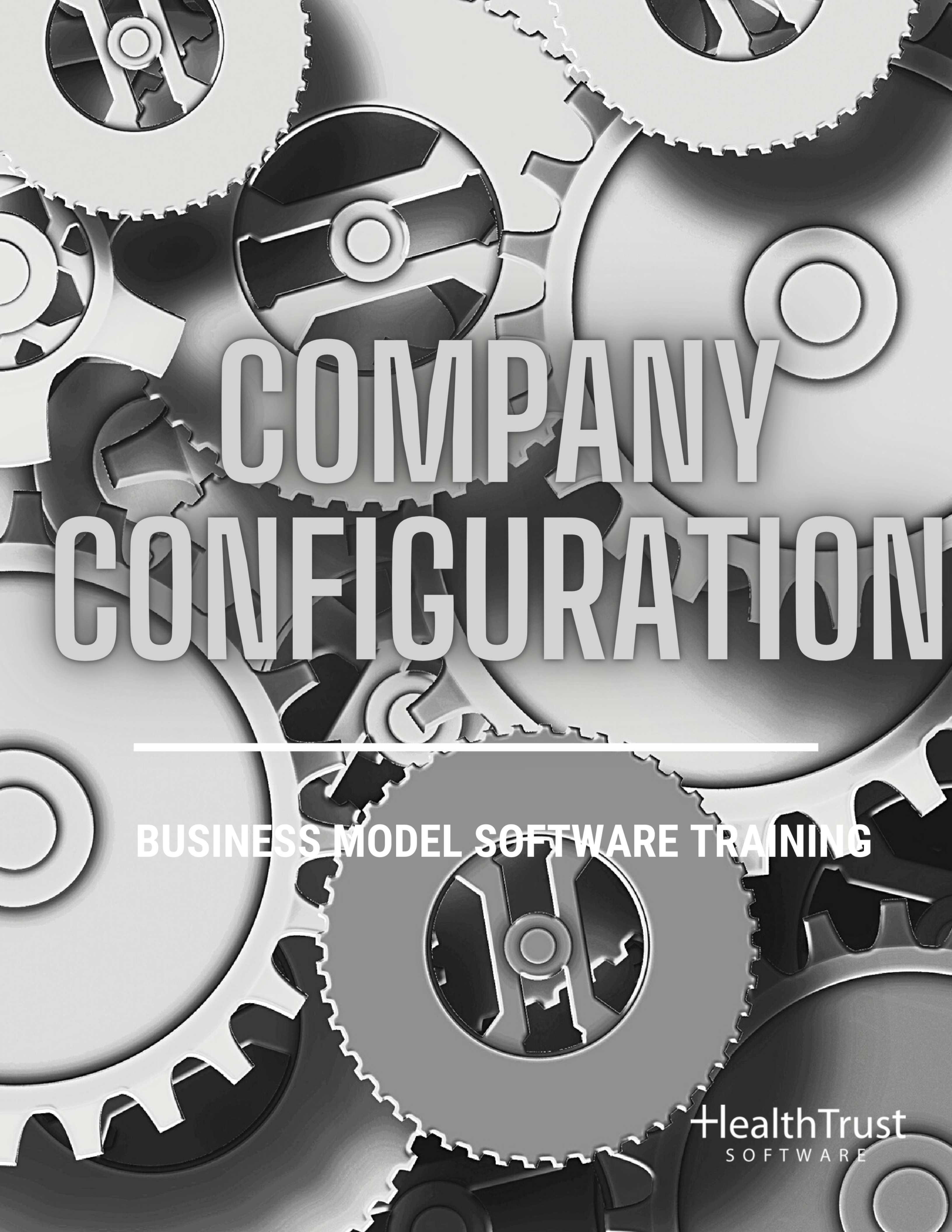


COMPANY CONFIGURATION

BUSINESS MODEL SOFTWARE TRAINING

HealthTrust
SOFTWARE

HealthTrust
SOFTWARE

BUSINESS MODEL SOFTWARE

Company Configuration: Recommended Training Course Agenda

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how to efficiently manage and use the administrative and organizational functions in 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

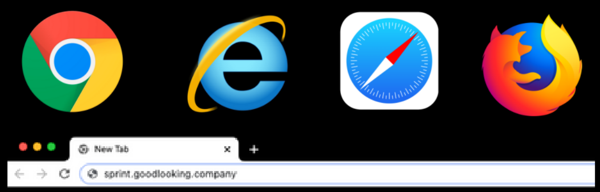
Estimated Duration: 1 hour 30 minutes

TOPIC	DESCRIPTION	
Initial User Setup	Learn how to log into the system	5 Minutes
Change Company Terminology	Learn how to change your company's terminology	5 Minutes
Change Personal Settings	Learn how to change personal settings for each user	5 Minutes
Set Up Your Org Chart	How to create org chart in the system and add jobs titles/descriptions	10 Minutes
Add New Employees	How to add new users to the system	10 Minutes
Add to Company Reference Lists	How to add to your company's reference lists	10 Minutes
Import to Company Reference Lists	How to import to company reference lists	10 Minutes
Tracking Requirements: Employee	How to create and add new employee tracking items	10 Minutes
Tracking Requirements: Office	How to create and add new office tracking items	10 Minutes
Set Up Holidays	How to add holidays to the system	5 Minutes
Other Admin Tools	How to use the other admin tools in the system	10 Minutes

Initial User Setup (Management Team)

1 **Open your web browser and go to the URL.**

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

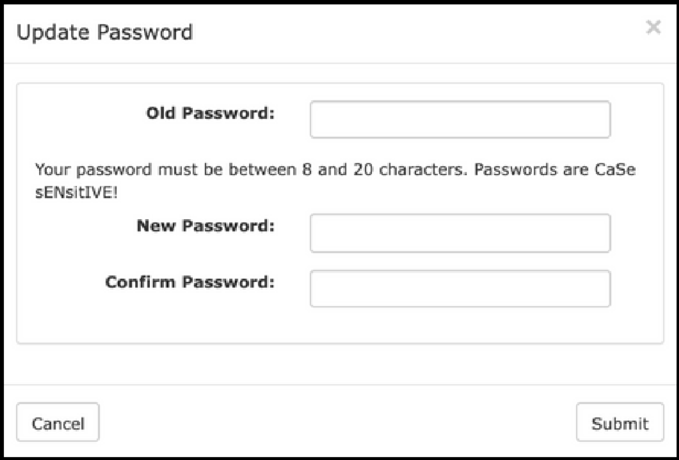


2 **Initial Credentials**

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

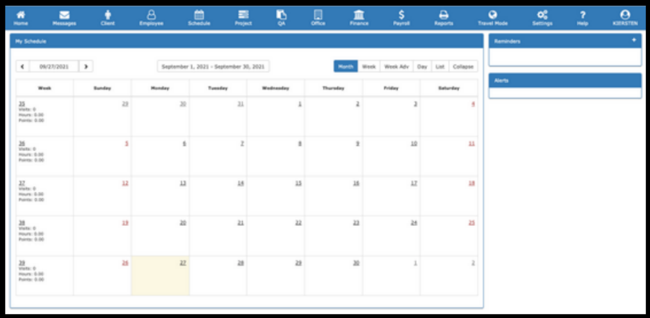
3 **Choose a new password.**

- 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.



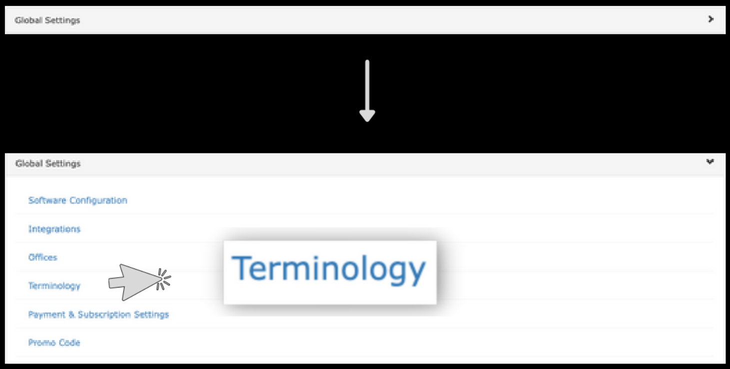
Change Company Terminology

1 Go to 'Settings' Tab

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

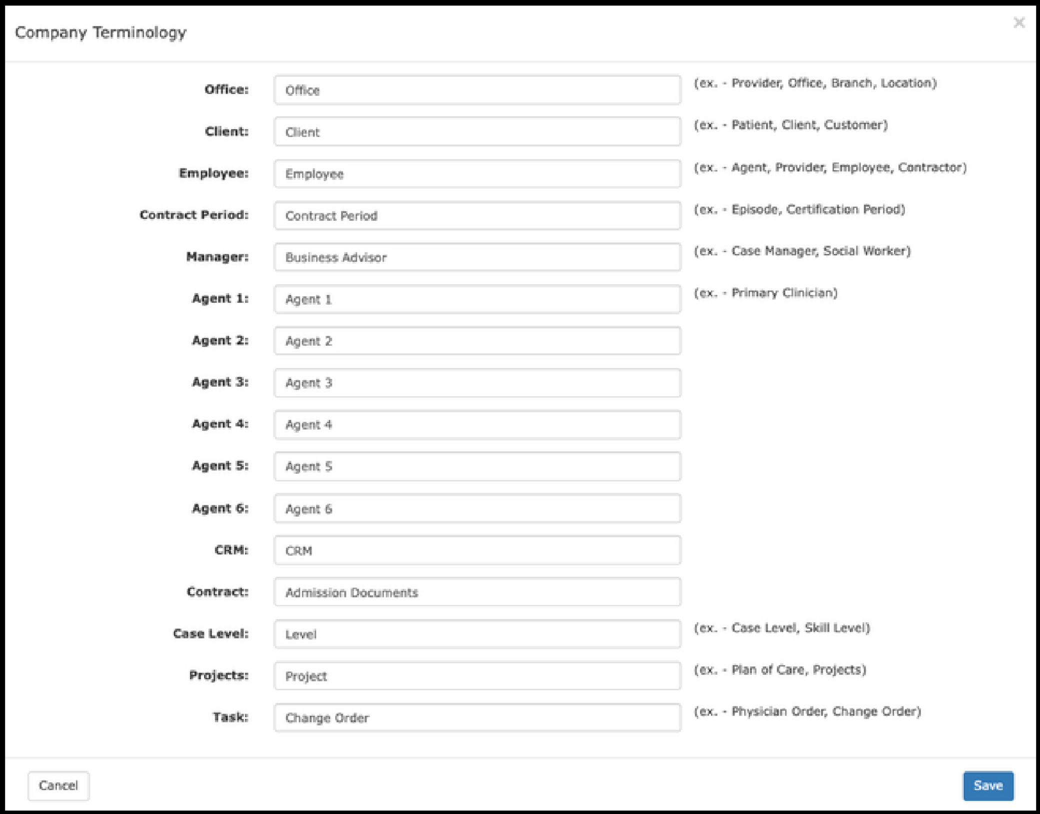
2 Global Settings ⟶ Terminology

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



3 Complete the Form

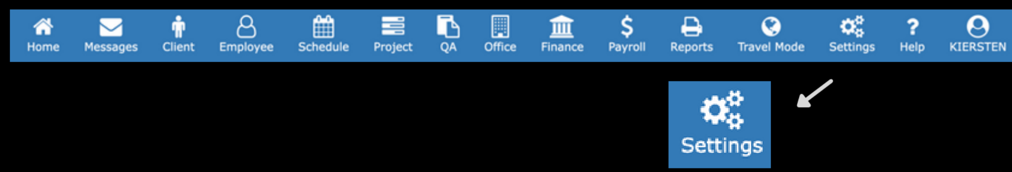
- A 'Company Terminology' Form will open up.
- Complete the form with the necessary fields. Don't Forget to click 'Save'.



Change Personal Settings

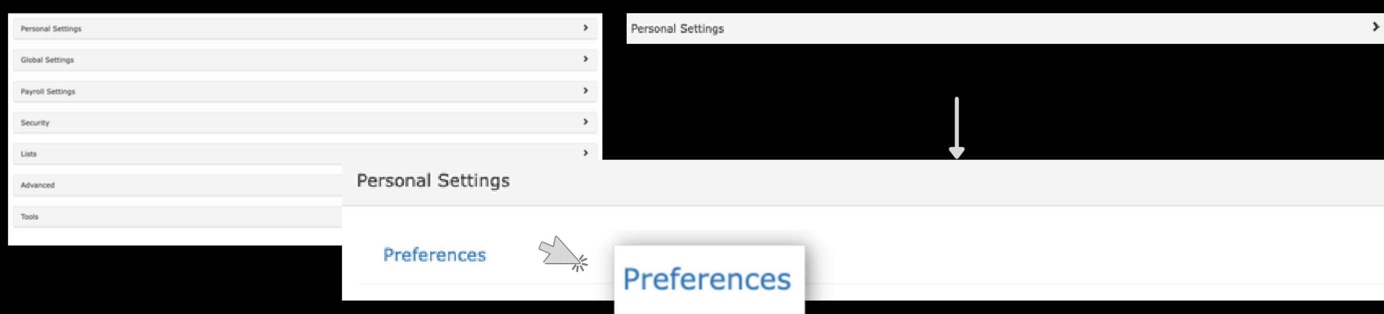
1 Go to 'Settings' Tab

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



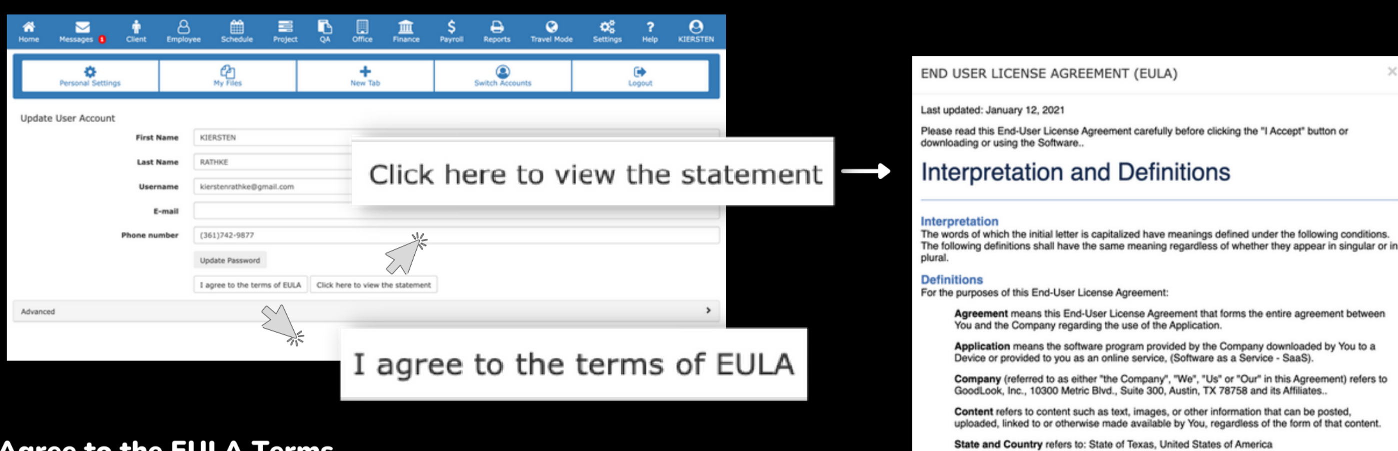
2 Personal Settings → Preferences

- 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.

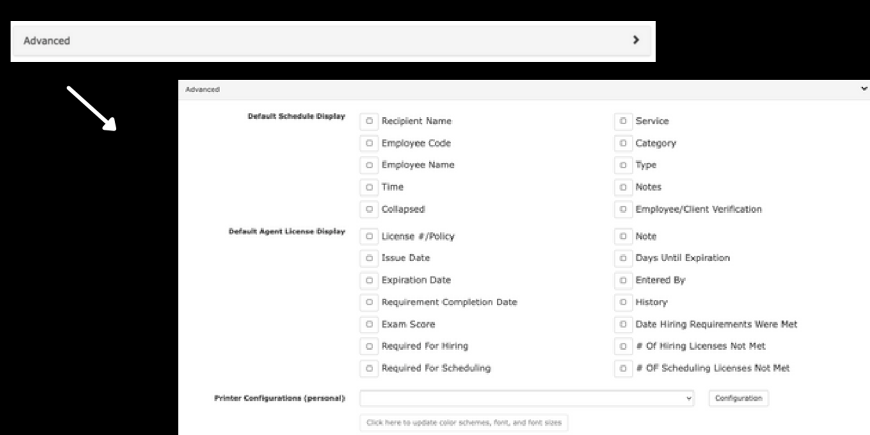


3b Agree to the EULA Terms

- 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'

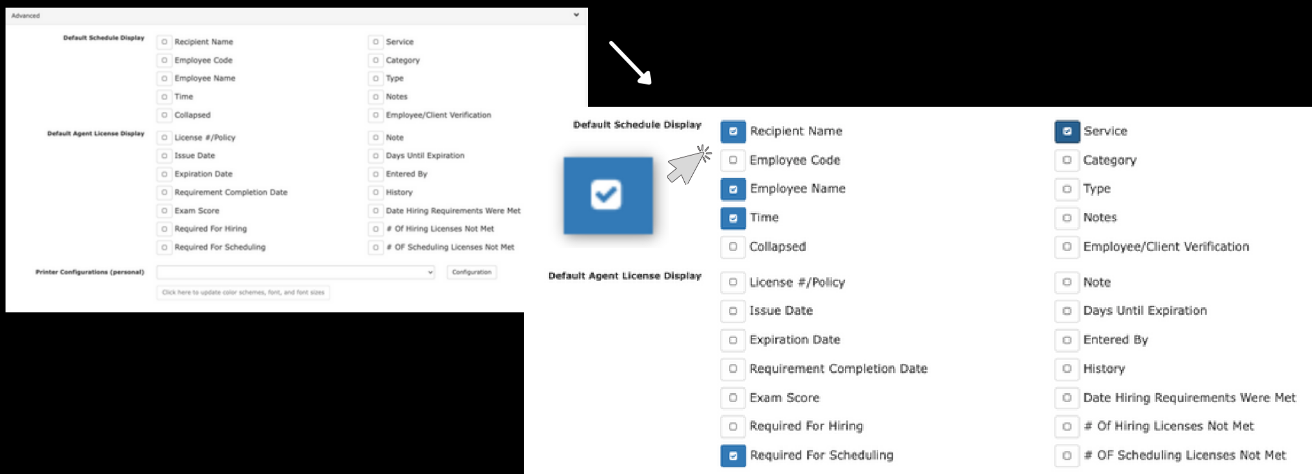
- Now that we have agreed to the terms. we can move forward with updating your preferences. Click on the Advanced options and a drop down list will open.



Change Personal Settings Continued

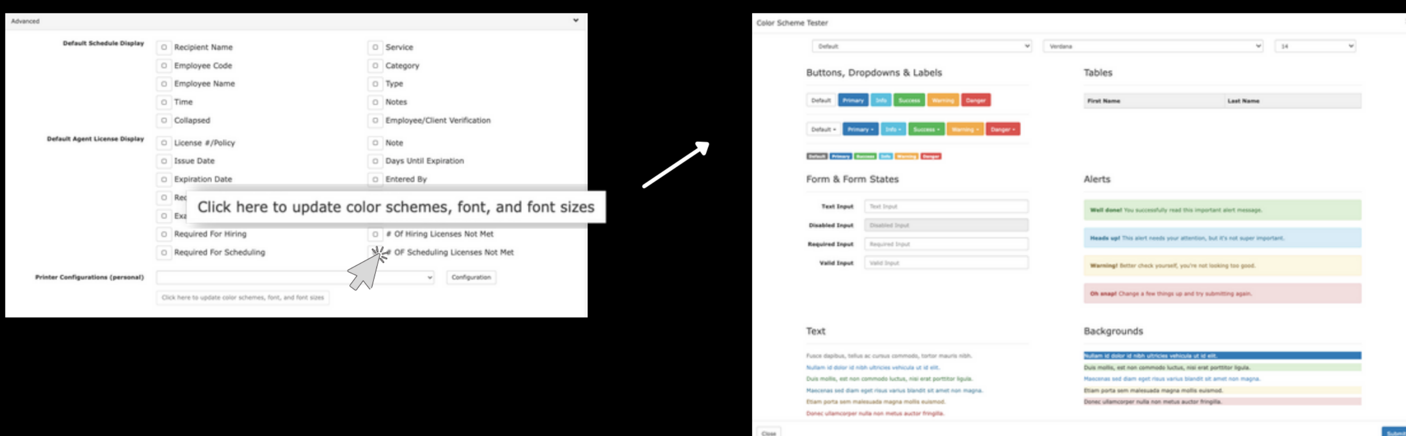
5 **Choose your Display Preferences**

- 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

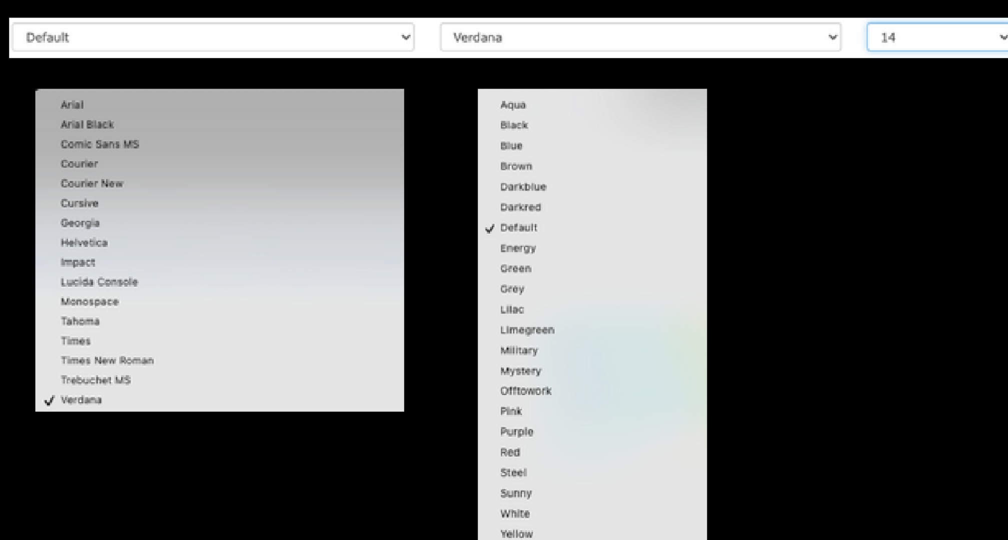


6 **Update your Style Preferences**

- 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.



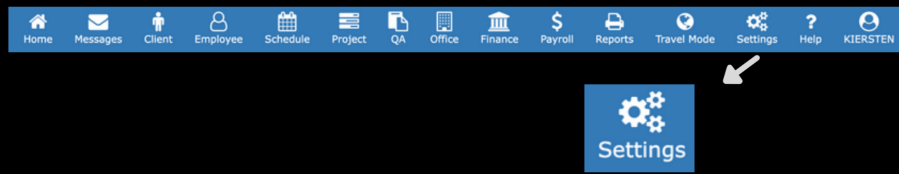
- Use the drop downs to choose from the different colors, font types and sizes.
- Once you have personalized it, don't forget to click 'Submit' on the Color Scheme Tester page and then 'Save' on the 'Preferences' page.



Set Up Your Org Chart

1 **Go to 'Settings' Tab**

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



2 **Go to 'Payroll Settings'**

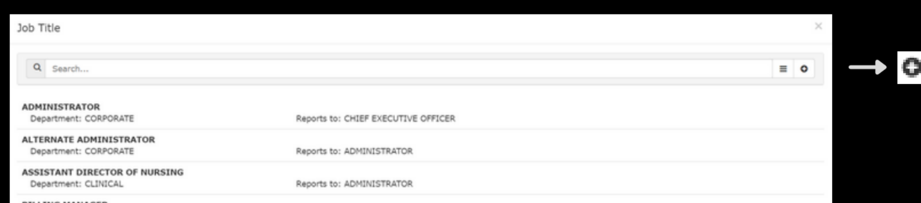
- In the listed options, click on the 'Payroll Settings' drop down

3 **Job Titles**

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

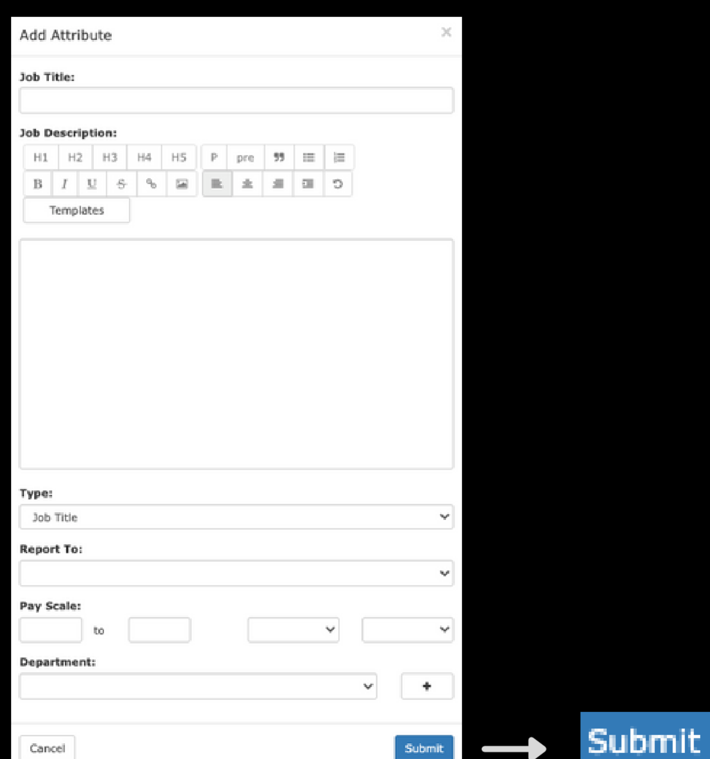
4 **Add a New Job Title**

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



5 **Complete the Form**

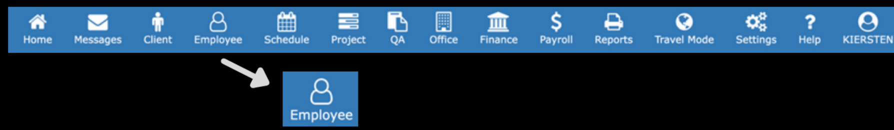
- Fill out the required fields with the lead's information.
- Don't forget to click 'Submit' on the bottom right of the form.



Add New Employees

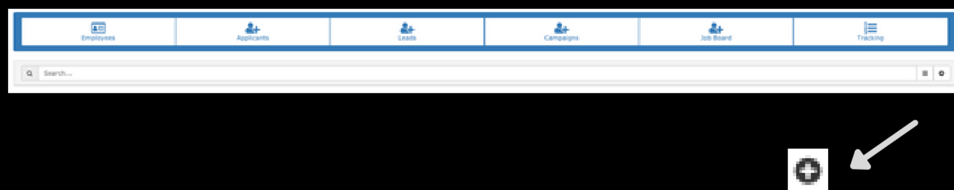
1 Go to 'Employee' Tab

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



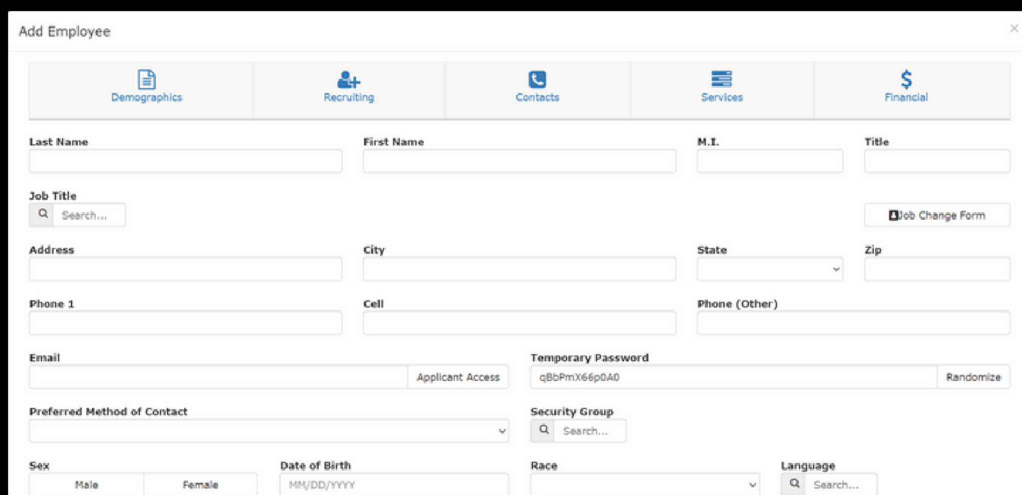
2 Add New Employees

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



3 Complete the Form

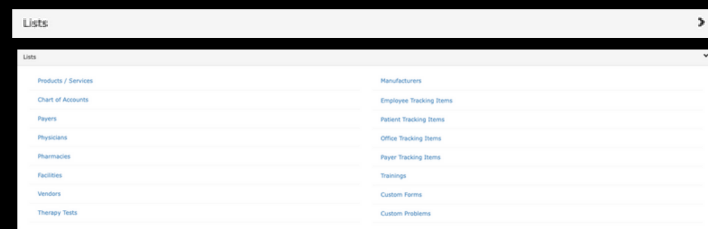
- Fill out the required fields and tabs with the employee's information.
- Don't forget to click 'Save' on the bottom right of the form.



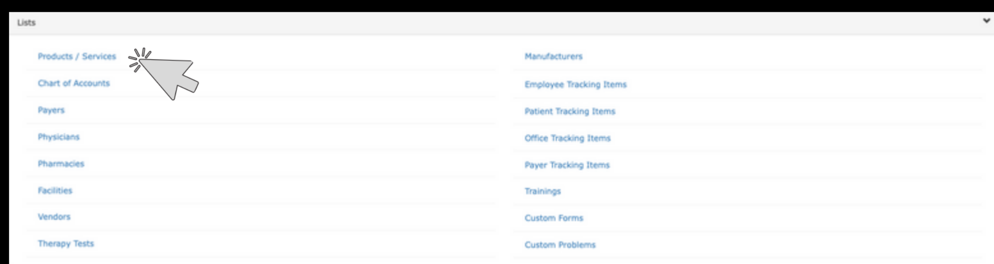
Adding to Company Reference Lists

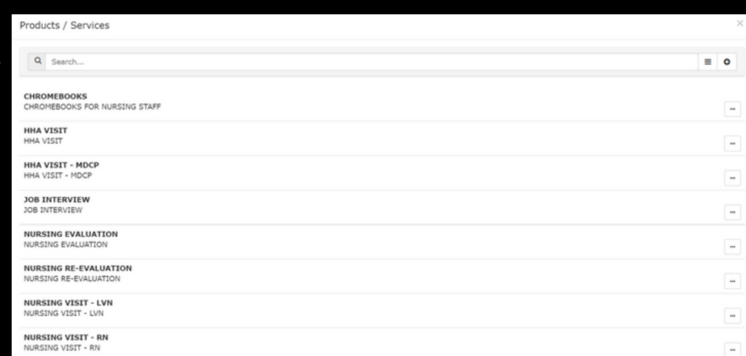
1. **Go to 'Settings' Tab**
   - On your home page, click the 'Settings' tab at the top tool bar

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

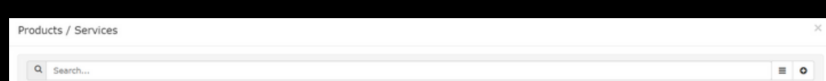


3. **Go to Products / Services**
   - Click 'Products / Services' in the Lists section.
   - A page will open listing all of your Products and Services.

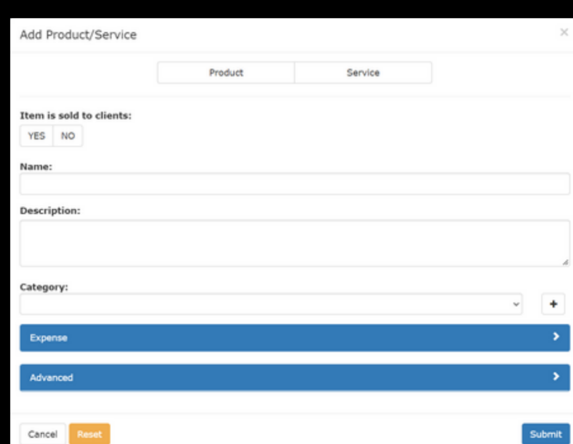




4. **Add a Product / Service**
   - To add a product/service, click the '+' button to the far right of the search bar.



5. **Complete the Add Product / Service Form**
   - When the 'Add Product/Service' form opens, you will select the type and complete the open fields.



*NOTE: Use this same process for adding to all company reference lists.

Importing to Company Reference Lists

1 **Go to 'Settings' Tab**

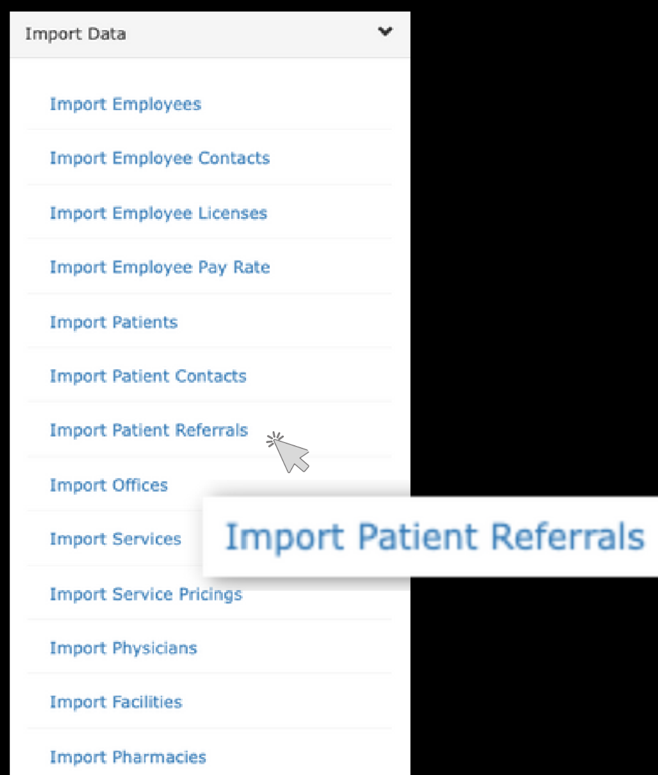
- On your home page, click the 'Settings' tab at the top tool bar

2 **Go to 'Tools'**

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

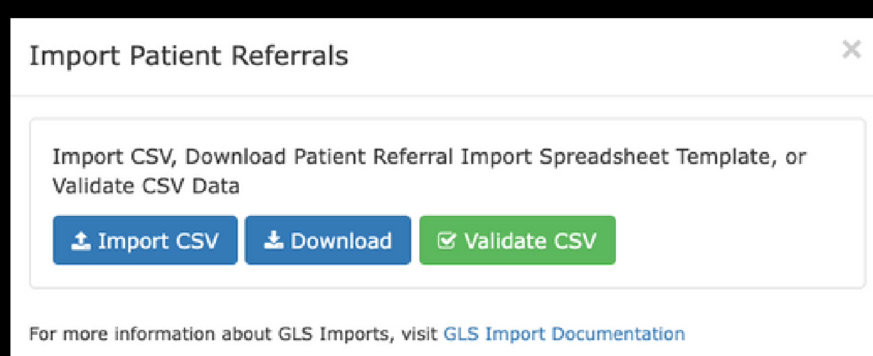
3 **Choose 'Import Client Referrals'**

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



4 **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.

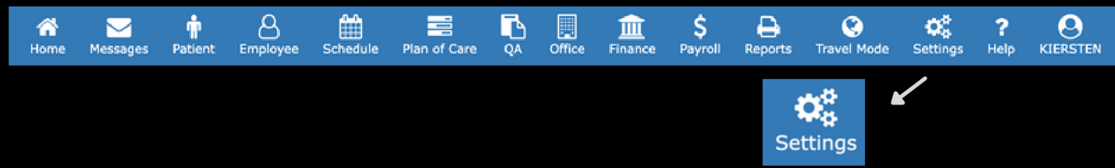


*NOTE: Use this same process for importing your company reference lists.

Tracking Requirements: Employees

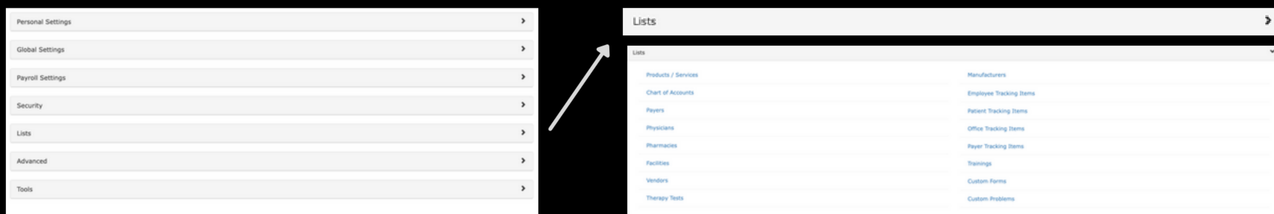
1 Go to 'Settings' Tab

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



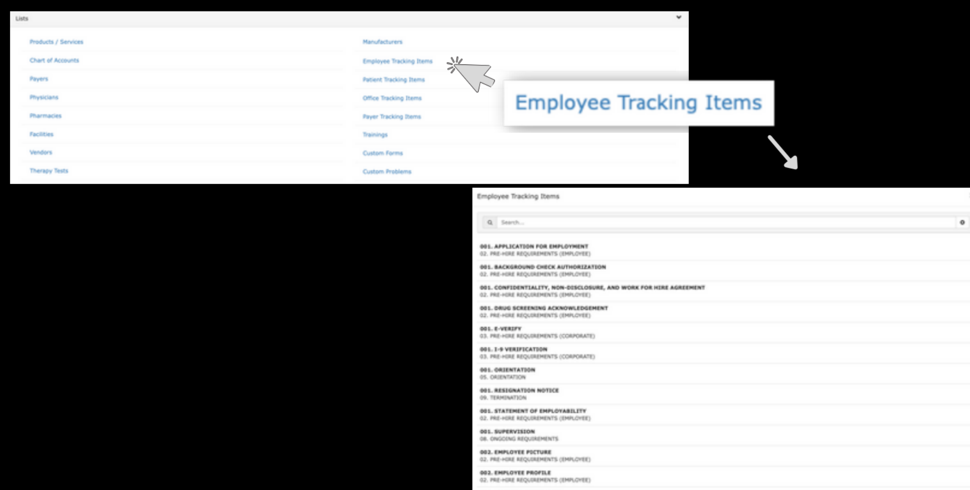
2 Select Lists

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



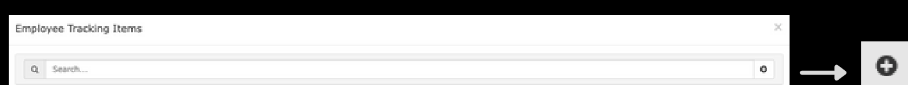
3 Go to Employee Tracking Items

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



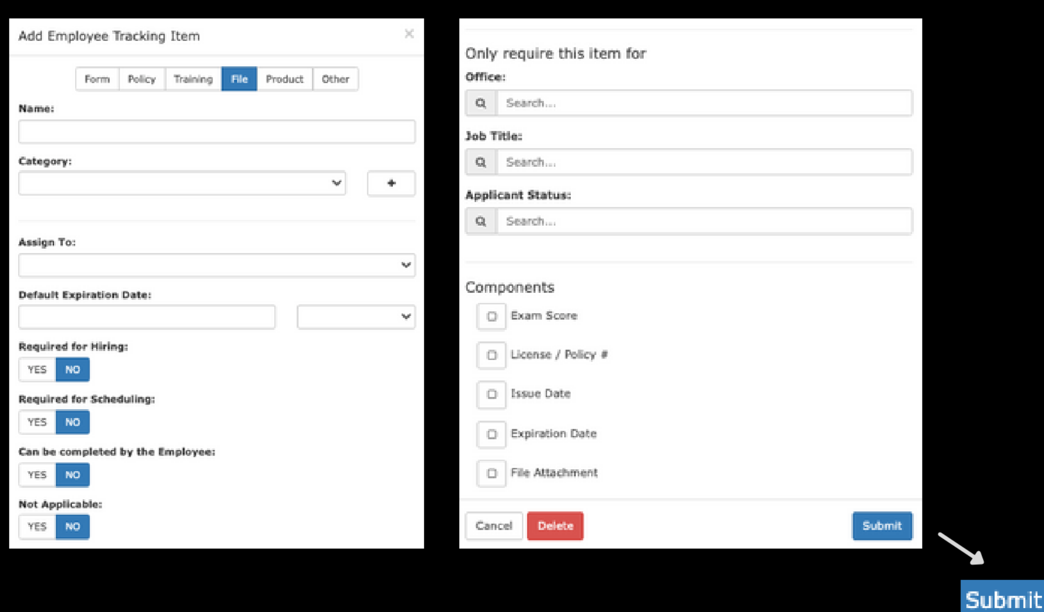
4 Add a Tracking Item

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



5 Complete the Add Employee Tracking Item Form

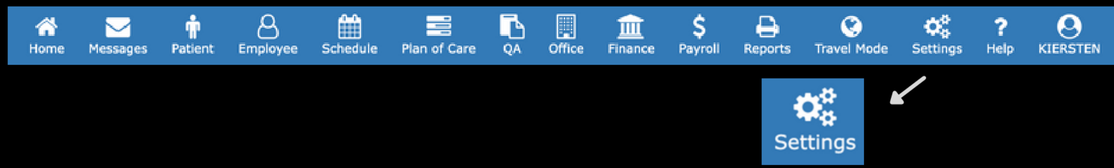
- When the 'Add Employee Tracking Item' form opens, you will select the type and complete the open fields.
- Input the Requirement settings and Components for the tracking item.
- Don't forget to click 'Submit'.



Tracking Requirements: Office

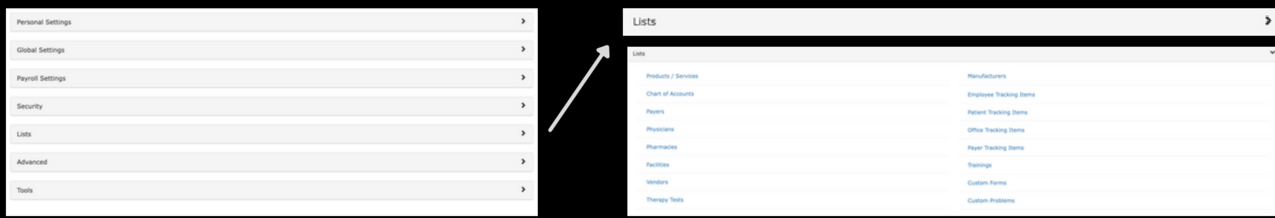
1 Go to 'Settings' Tab

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



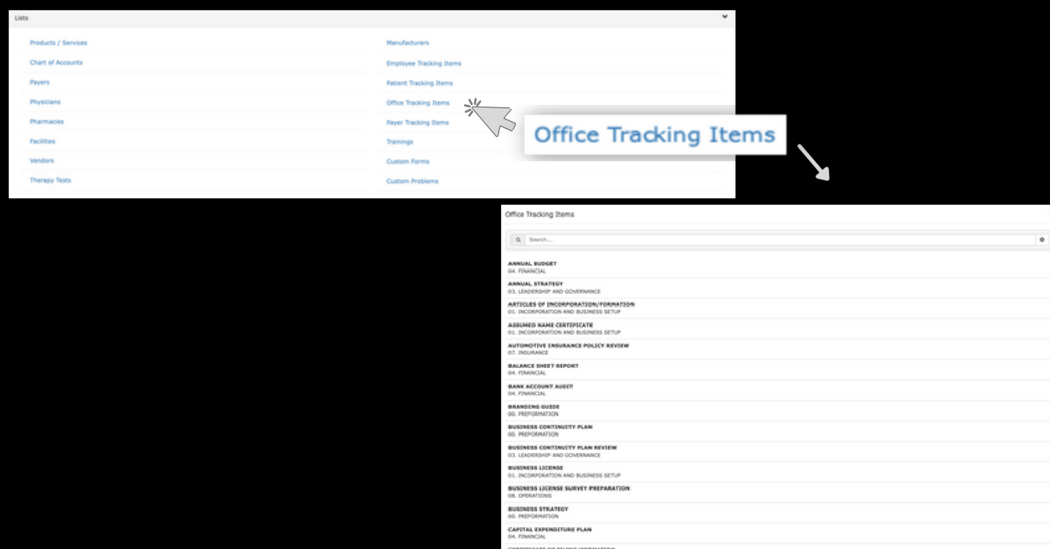
2 Click on Lists

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



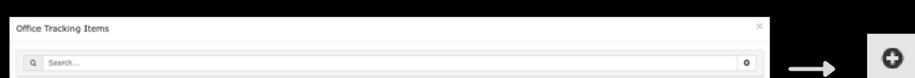
3 Go to Office Tracking Items

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



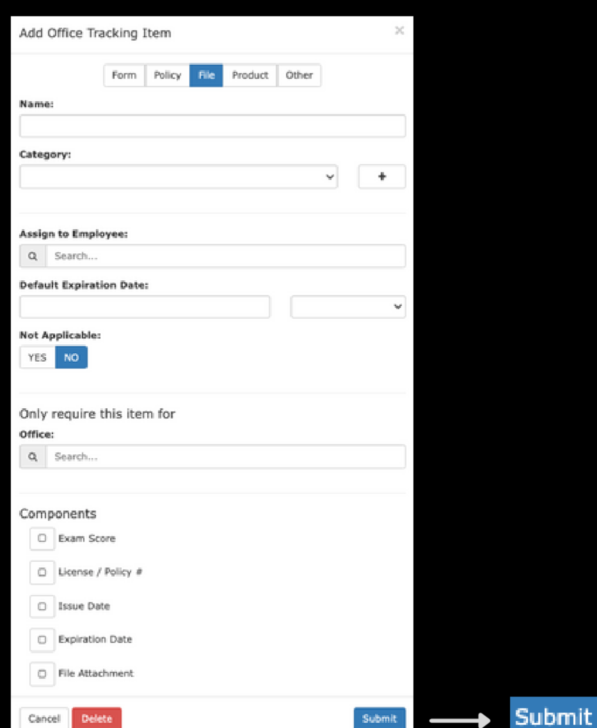
4 Add a Tracking Item

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



5 Complete the Add Office Tracking ItemsForm

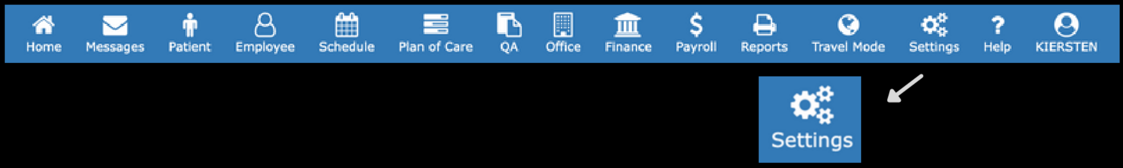
- When the 'Add Office Tracking Items' form opens, you will select the type and complete the open fields.
- Input the Requirement settings and Components for the tracking item.
- Don't forget to click 'Submit'.



Set Up Holidays

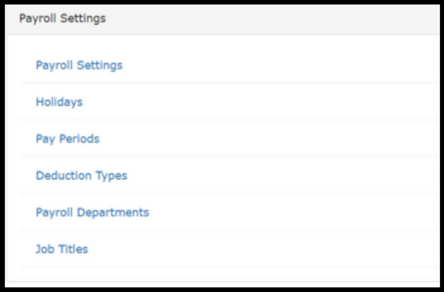
1 Go to 'Settings' Tab

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



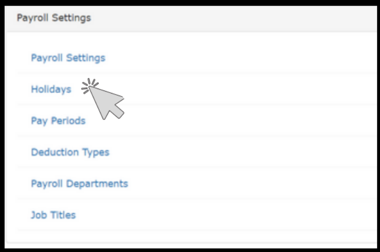
2 Go to Payroll Settings

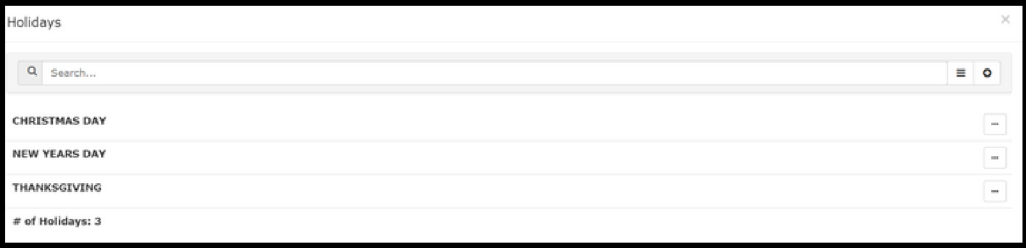
- Select 'Payroll Settings' in the Settings page.



3 Go to Holidays

- In 'Payroll Settings', select 'Holidays' from the drop down menu.
- A list of your company's current holidays will appear.



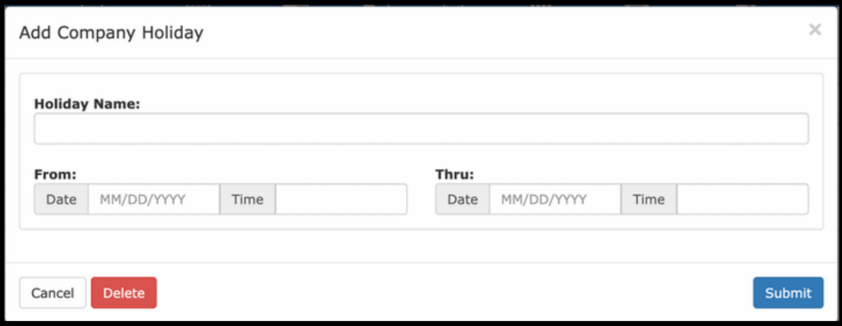


4 Add a Holiday

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

5 Complete the Add Holiday Form

- When the Add Holiday form opens, you will complete the open fields.
- Press the Submit button on the bottom right.



Other Admin Tools

1 Go to 'Settings' Tab

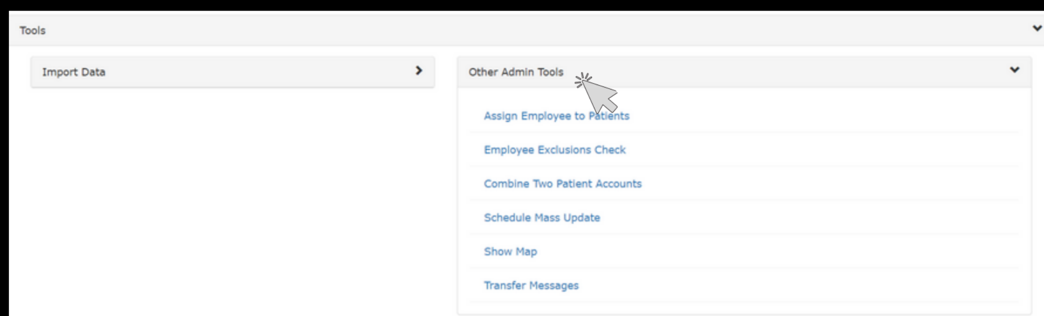
- On your home page, click the 'Settings' tab at the top tool bar

2 Go to 'Tools'

- In the listed options, click on the 'Tools' drop down menu.

3 Choose 'Other Admin Tools'

- Select 'Other Admin Tools' from the drop down menu..



4 Select an Option

- Select an option from the 'Other Admin Tools' drop down menu.
- Complete the form that opens and press the 'Submit' button.