



Quick Sheet: Getting Started

Overview: This document describes the first things you should do after you install doc2MD on your computer network.

Connect to your Practice Management System (PMS) – The doc2MD software is capable of interfacing with multiple PMS systems. The two ways in which the doc2MD software accomplishes this task are either direct connect (in the case of Medisoft) or via HL7. If you use Medisoft as your Practice Management System, you must follow the instructions detailed in the [Quick Sheet](#) available on the doc2MD’s Training Center. By configuring doc2MD to interface with your PMS, you get the benefit of automatically loading patient demographics into doc2MD. Different PMS applications offer different benefits. For instance, the interface to Medisoft offers the added benefit of being able to retrieve prior billing information for quick review as well as automatically entering patient encounters based on the Medisoft Patient Schedule.

Create your first patient encounter – Creating a patient encounter is very simple. To get a quick understanding of how to do this, visit our [Training Center](#) at www.doc2MD.com and select from our training videos that are available.

- [Creating a SOAP Note Video](#)
- [Create your first patient encounter Quick Sheet](#)

Review the doc2MD’s User Guide – The doc2MD User’s Guide provides an overview of the functionality within the doc2MD application. Take some time to review the document so that you get familiar with the features and capabilities of the software. If you have questions regarding how to use doc2MD, go to the [doc2MD User Forum’s](#) to post a question. This forum is monitored by doc2MD staff members and usually has responses posted within 24 hours of the original entry.

Change staff descriptors - By default, doc2MD comes configured with one medical provider (John Q. Public) and three Assistants. Once you are ready to use doc2MD to document patient encounters, you should update these items to reflect the staff within your office. Follow the instructions within the doc2MD User’s Guide under the topic “Configuring doc2MD”.

For other useful tips regarding the use of doc2MD, make sure to visit and review all of the training material and user forum posts.