

# MOMENTUM 2026 Pre-Conference Agenda

Join your ModMed® training consultants, medical directors, and business consultants for an immersive pre-conference workshop. Designed for users seeking to enhance their skills, improve workflows, and optimize product use, this hands-on training explores the latest features, process-streamlining strategies, and tips for maximum efficiency.

## Track 1: Foundational – Core Product Mastery

**Target Audience:** *New users (typically <2 years), new hires, or any staff members seeking a comprehensive refresher on core system logic.*

Session Title & Description
<p><b>Clinical Documentation Fundamentals</b></p> <p>This is a comprehensive guide to core clinical workflows, focusing on the essentials of documentation, navigating the visit, provider customization, and clinical queue management to ensure a smooth, efficient patient encounter. Participants will leave with a standardized approach to documentation that enhances note quality and drives clinical efficiency.</p>
<p><b>Front Office Fundamentals</b></p> <p>The front office is the engine of the practice. This session covers core workflows from the first touchpoint to the last, including appointment scheduling, streamlined patient check-in, and check-out efficiencies.</p>
<p><b>Billing and Reporting Fundamentals</b></p> <p>This session follows the "life of a claim" through the PM system by breaking down core workflows and essential reporting tools needed to monitor daily revenue operations. Participants will learn to identify common billing errors early and understand the data behind their practice's financial health.</p>
<p><b>Xtract Customization Fundamentals</b></p> <p>Stop fighting default settings and start tailoring the system to your unique needs by learning to configure Global Profiles and Quick Filters, and leveraging "Design Mode" on the iPad to build custom windows and layouts. This session will help you transform your iPad interface into a personalized workspace that speeds up and simplifies documentation.</p>

## Track 2: Advanced – Workflow Optimization & Efficiency

**Target Audience:** Advanced users (typically 2+ years) or high-performing newer users ready to move beyond the basics to maximize system performance.

Session Title & Description
<p><b>The 2026 "Heavy Hitters": Adoption of the Latest Clinical, PM, and Xtract Features</b></p> <p>Stay ahead of the curve with an expert-led overview of the most impactful 2026 releases across Clinical, PM, and Xtract. We won't just show you what's new; we'll show you how to implement these features strategically so you can be the first to leverage the newest platform updates to drive practice efficiency.</p>
<p><b>The Analytics Deep Dive: PM &amp; Clinical Insights for Decision Making</b></p> <p>Move past basic reporting and into the world of advanced data visualization. This "dual-lens" session uses Clinical Analytics to measure patient throughput and PM Analytics to track revenue trends, teaching you how to interpret complex data sets to make informed, strategic decisions for practice growth.</p>
<p><b>Clinician Customization: Advanced Protocols &amp; Personalization</b></p> <p>A deep-dive workshop for providers ready to shave minutes off every visit. We'll cover advanced protocol utilization and clinician-level customizations.</p>
<p><b>The Efficiency Challenge: Mastering Clinical Workflows</b></p> <p>In this high-energy, interactive session, attendees will collaborate and "battle" over the best approaches to handling complex workflows, including Results, Prescriptions, Orders, and Task Management. By sharing strategies and competing to find the most efficient path, you will uncover diverse "best practice" methods from your peers and adopt the ones that fit your practice style to maximize time savings.</p>
<p><b>Quotes, Commissions, and Packages</b></p> <p>Master the complexities of quotes, commissions, and package management within the PM system. This session is essential for practices with high retail or product-based revenue, providing the tools to streamline your operations and ensure every commission and package is tracked with accuracy. (Exclusively for select EMA specialties)</p>

## Track 3: Innovation – Future-Looking Strategy

**Target Audience:** Forward-thinking users of all experience levels interested in AI, automation, and the next generation of patient engagement.

Session Title & Description
<p><b>Advanced Configurations for Practice Management Optimization</b></p> <p>Join us for a session that will uncover powerful yet underutilized automation features to help you save time and improve efficiency. Whether you are auditing your current setup or building a more sophisticated architecture, you will leave with the tools to maximize practice output.</p>
<p><b>Scribe: Advanced Adoption and Clinical Mastery</b></p> <p>Led by our Medical Directors, this session is for those ready to elevate their mastery beyond the basics of ModMed Scribe and gScribe. We will dive into clinical best practices and advanced system optimization, teaching you advanced clinical strategies that capture more detail with less effort.</p>
<p><b>Patient Engagement: Elevating the Experience through Innovation</b></p> <p>It's more than just messaging. Learn how to fully utilize the patient engagement ecosystem for automated patient intake, proactive follow-ups, and reputation management. This session will show you how to build a digital patient journey that operates automatically, keeping patients engaged without extra staff effort.</p>
<p><b>The "Expert" Factory: Building Teams &amp; Leveraging Services</b></p> <p>A roadmap for Admins and Practice Leads to bridge internal knowledge gaps by leveraging Business Consulting and Optimization services. You will learn how to build an internal "Core Team" to maintain peak performance long-term and leave with a concrete plan to train your own internal "super-users."</p>