

CATEGORY: SCHEDULE ~ TASK: APPOINTMENTS

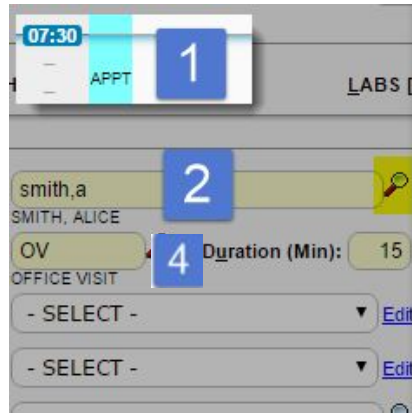
How to Add an Appointment

- Check In/ Manage an Appointment 2
- How to collect a Copay 4
- Check Out / Next Appointment / Rescheduling 4
- Rescheduling 5
- How to remove from Rescheduling queue 5

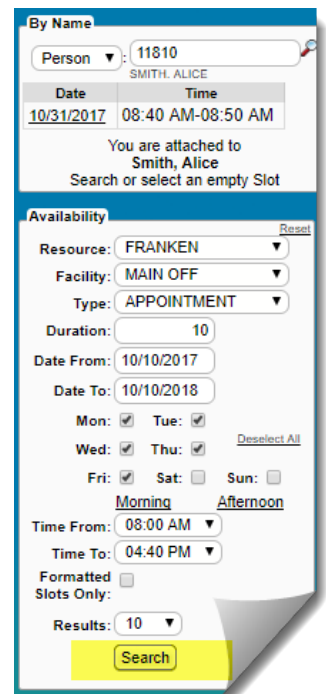
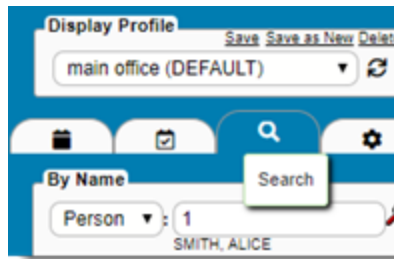
How to Add an Appointment

From the Calendar

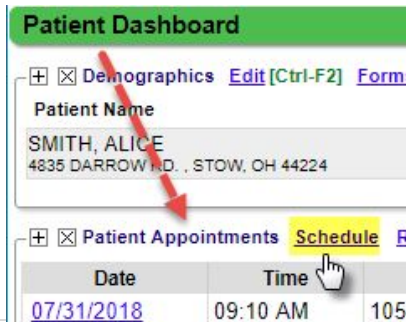
1. Click the desired Slot for the appointment
2. Look up the patient, in our example Smith
Then use one of these look up methods:
Tap [Home] key *or*
Tap the [Tab] key *or*
Double Click the mouse in the field *or*
Click on the magnifying glass
3. Click ID hyperlink of patient or create a new patient > Click [Register Patient]
4. Choose an Appointment type, the Duration (in Minutes) - can be edited
5. [Save] the appointment and proceed to your next task *or* [Save/Manage] to continue working with this appointment



Or use the 'Search' feature to check for future appointments and 'Availability' > then follow Steps 1,4,5



From the 'Patient Dashboard' > Schedule



CATEGORY: SCHEDULE ~ TASK: APPOINTMENTS

A. Add an existing Case from or 'Add New' from the dropdown

This feature allows the user to affiliate specific Insurance, Accident, Injury and other details with this appointment which creates a default in Charge entry
 B. Default > authorization from the Case
 C. Lookup to the Referring Provider Library
 D. Reason for referral
 E. Brief Reason for the Appointment
 F. Unlimited Notes about the patient or Reason

G. Check to access recurring appointment options

H. Check to access Wait List options

I. Facility for the appointment

J. Link to Block Time

K. Link to add patient from the 'Reschedule Queue'

L. Link to add patient from the 'Wait List'

M. Choose additional 'Resource' for this appointment, such as lab blood draw...

N. Click to 'Edit' patient then 'Refresh' to show change

O. Hover-over for details of Insurance Policy

P. Patient Balance

Check In/ Manage an Appointment

Recommended workflow for the front desk: Verify the patient demographics, Insurance, collect copay and click to [Check In]

Find the appointment easily by using the 'Search' button in the sidebar

1. Use the lookup
2. Click the date hyperlink
 - o this filters the page for the resources and facility and causes the appointment to blink
3. **Click** on the Appointment

CATEGORY: SCHEDULE ~ TASK: APPOINTMENTS

In the Popup >

Robert Dylan [3856] | 01/01/1932 | 86 years | M ~ 40 MIN TEST Check-in/out, Reschedule, Key in Copay/Payment on account and more

Phone: H: (330) 473-7512 W: 330-6855 Address: 4835 Darrow Rd. Stow, OH 44224

Insurance: [1]-WK [No Effective - No Expiration] (Additional Profiles Exist)

Date: 11/15/2018 (40 min) Resource: TEST DR Facility: MAIN OFF

Instructions: Reason:

Status: SCHEDULED [S] 1 Check In Cancel Reschedule Delete New Appt To Worklist

Edit Appointment	Patient Dashboard	Enter Copay	Patient (\$0.00): <input type="radio"/>	Guarantor (\$199.07): <input type="radio"/>
Print Ticket	Edit Demographics	Enter Charge	Pat Bal: 0.00	Last Payment: 07/24/2018
Print Schedule	Insurance Management	Service History	Escrow: 30.00	Amount: 10.00
Print Form	Recalls 2	Eligibility	Col Bal: 0.00	Dunning: 3 0.00
			Ins Bal: 431.45	

Scheduled By: SUPPORT at 11/15/2018 • 05:42 PM Last Modified By: SUPPORT at 11/15/2018 • 05:42 PM [Change Log](#) 4

Referring: Referral Reason:

Case: 5 WORKERS COMP Authorization: 6

Note: Reminder:

Recurrence: [Add](#) 7 Wait List: 8

Marketing: 10 Appointment ID: 94211 9

1. Dropdown 'Status' or use one of the buttons to Check In, Cancel, Reschedule
2. Hyperlinks to Manage the appointment, Patient details and access other functions
3. Patient Balance section: Guarantor > radio button to access, hover-over the Guarantor ID for per-patient breakdown of balances
4. History link- full audit history of this appointment, also available from 'change log' on the patient dashboard, filtered by appointment
5. Case
6. Authorization
7. Recurring appointments
8. Waitlist
9. Appointment ID - useful for interfaces and change log
10. Custom fields they will show here

Edit Appointment	Patient Dashboard	Enter Copay	Patient (\$300.00): <input type="radio"/>	Guarantor (\$300.00): <input type="radio"/>
Print Ticket	Edit Demographics	Enter Charge	Guarantor: Rod Kane	24432
Print Schedule	Insurance Management	Service History	Pat Bal: 300.00	Last Payment: 0.00
Print Form	Recalls		Escrow: 0.00	Amount: 0.00
			Col Bal: 0.00	Dunning: 4.00

Hyperlinks defined:

[Edit Appointment](#) - popup for the Add/Edit original appointment

[Patient Dashboard](#) - opens a new tab to the full patient dashboard

[Edit Demographics](#) - opens a new tab on the 'Edit' page for demographics

[Insurance Management](#) - open a new tab on the 'Insurance Management' page

[Recalls](#) - log any future recalls for this patient

[Enter Copay](#) - is highlighted with an amount if the copay field is populated on the Primary Insurance
Click to add the Copay and [print receipt]

Link changes to 'Copay Entered' after receipt is entered

[Enter Charge](#) - Opens new tab to 'Post Charge', pre-populated patient/appointment details

CATEGORY: SCHEDULE ~ TASK: APPOINTMENTS

Service History - open history of charges

Eligibility History - open history of all real time eligibility checks run

How to collect a Copay

1. Click 'Enter Copay' link on the appointment page
2. Add the Receipt details > SAVE

Check, Cash, CC amount

Copayment auto-populates

In the Reference/Check number field type the word CASH for 'cash payments' or the check number or CC info

3. Print the Receipt > close the Popup

John Smith [10007] | 05/19/1963 | 53 years | M ~ APPOINTMENT

Phone: H: (330) 234-3845

Status: [SCHEDULED [S]] [Check In] [Cancel]

Post Visit Copay Patient: 10007

Post Date	DOS	Balance
01/16/2017	01/16/2017	
Post Uncollected Copay		0.00

If any amount of the Total Received is a copay, enter that portion into the

Check	Cash	Credit Card	Total Received
\$20.00	0.00	0.00	20.00

Copay Reference / Check Number: 1234

POS Note: APPOINTMENT

[Print Receipt] [Save [F2]] [Cancel]

Check Out / Next Appointment / Rescheduling

Click [**Check Out**] - not a requirement, but recommended as this action removes from 'Checked In' list
 Make the **Next Appointment**, Click [New Appt] > this acts as a copy/paste feature

1. Click [New Appt] on the original appointment screen
2. Close the appointment popup > Use [ESC] on your keyboard or click the x to close
3. You are now attached to the patient, displays center page

Alice Smith [10008] | 02/18/1953 | 64 years | F ~ APPOINTMENT

Phone: Address: 123 Main Akron, OH 44333

Insurance: [1]-AETNA (DEFAULT) [No Effective - No Expiration]

Date: 10/10/2017 Time: 08:50 AM (10 min) Resource: LOUISE FRANKEN Facility: MAIN OFF

Instructions: [Copied] [New Appt] [To Worklist]

Status: [CHECKED IN [I]] [Check Out] [New Appt] [To Worklist]

Click to Attach to the Patient and Copy the Appointment.

Tuesday 10/10/2017 Appointments: 3 You are attached to Smith, Alice Day

Add/Modify Appointment

Date: 10/31/2017 Time: 08:40AM Facility: MAI

Resource

Appointment Paste

Person: 11810 SMITH, ALICE

Type: AP APPOINTMENT Duration (Min): 10

Case: [Edit]

Authorization: -SELECT- [Edit]

Referring:

Referral Reason:

Reason: left ankle pain

Note: hard of hearing

[Save [F2]] [Save/Manage] [Cancel]

Clipboard

Filter Criteria [Clear]

Person	Last Name	First Name	Date	Time	Resource	Facility	Type	Reason	Note
11810	SMITH,	ALICE	10/10/2017	08:50 AM	LOUISE FRANKEN	MAIN OFF	APPOINTMENT	left ankle pain	hard of hearing

Page Size: 500 1

Appointment Paste

Person: 11810 Name: ALICE SMITH

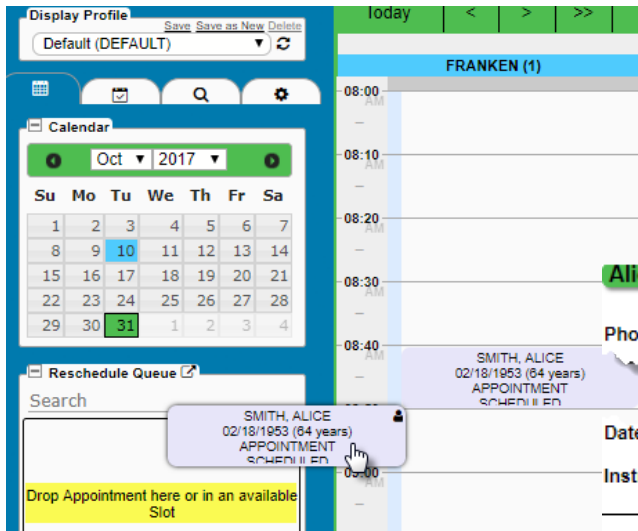
4. Click Paste to click to select the details of the previous appointment or simply key in new details and skip this step

5. Edit or change anything needed > [SAVE]

Rescheduling

There are several ways to reschedule an appointment

1. DRAG and DROP



Left click and drag the appointment to another time on the visible schedule or to the Reschedule Queue which allows us to reschedule when we are ready

Alice Smith [10008] | 02/18/1953 | 64 years | F ~ APPOINTMENT

Phone: _____ Address: _____

Date: 10/10/2017 Time: 08:50 AM (10 min) Resource: _____

Instructions: _____ Reason: _____

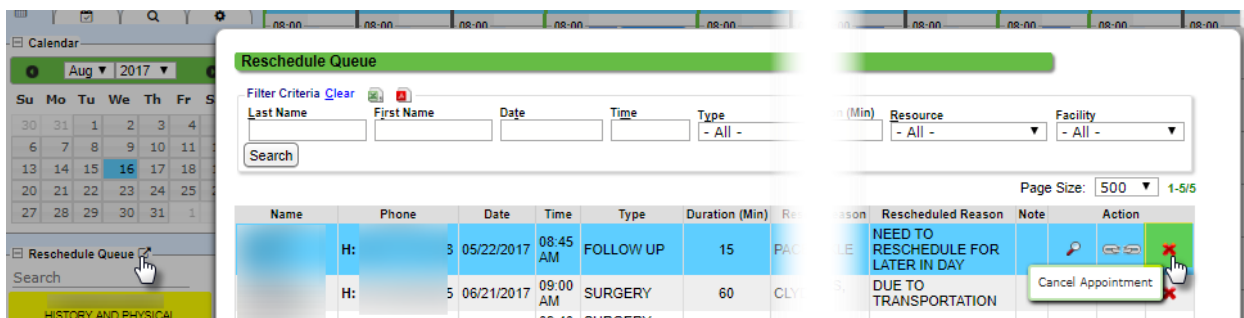
Status: **SCHEDULED [S]**

2. From the Appointment page > Reschedule Button

- You are presented with three options after clicking [Reschedule]
 - Link - Click to link to an existing appointment for this patient
 - Search - Opens the Search feature in the sidebar - filtered for this Patient
 - Close the popup and manage from the rescheduling queue

How to remove from Rescheduling queue

Patient is in the rescheduling queue but they never made a new appointment, how do I remove the patient from the queue



sidebar - pop out the rescheduling queue as shown above

- Click the red X to cancel the appointment