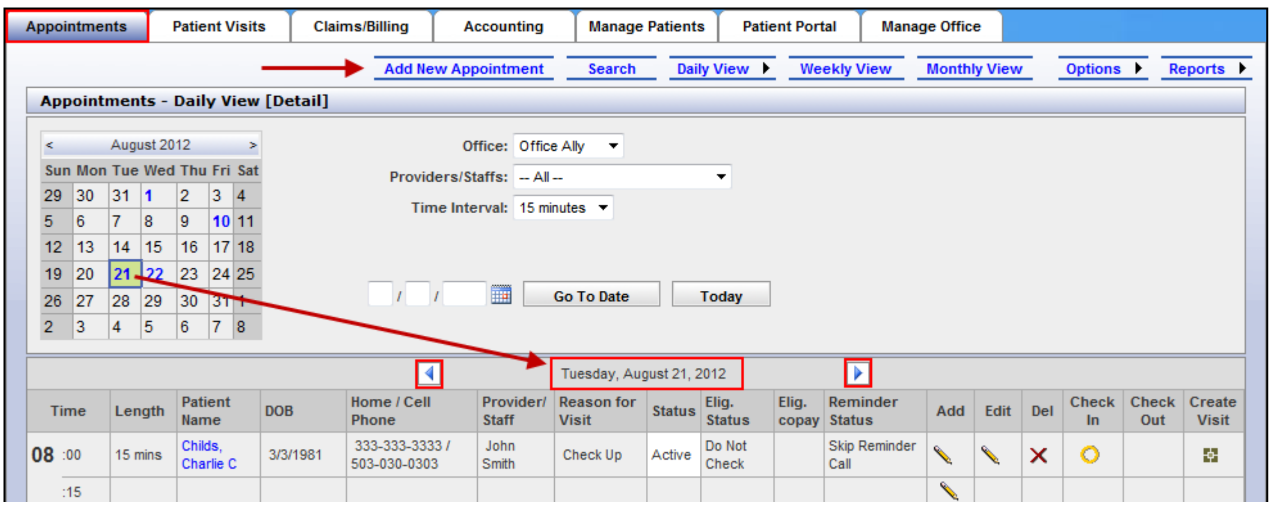
# APPOINTMENTS TAB

## OVERVIEW

The **Appointments Tab** is used to set up appointments, reschedule or edit existing appointment information, check patients in and out, and create Patient Visits. The visual display, and some features in the **Appointments Tab**, may be customized to best suit your individual office workflow. If you are using Office Ally's EHR program, any appointments created in that program can be integrated with the **Appointments Tab** in Practice Mate. In your EHR account, the ***Manage Office>Admin Section>System Preferences*** section will have **Yes** defaulted for the **Show Practice Mate modules** option. This will need to be selected to integrate the Practice Mate and EHR appointments.

At the top of the page there are links and sub-links which allow you to perform tasks or view information in different display options.

The calendar in the left corner will have the date being viewed highlighted. The date in this calendar will indicate the date listed above the appointments. Click on a date to view the schedule for that day, or toggle between months by using the arrows to the sides of the month. The arrows on the sides of the date on the appointment chart will move the view one day back or forward respectively. This information will be available in every Calendar View.




## APPOINTMENTS TAB

The top middle section allows you to adjust the information given in the views. If you have multiple offices, you can select the one you'd like to view with the drop down list under **Office**. If you'd like to see the schedule for a particular provider or staff member, select them from the **Providers/Staff** drop down list. To change the time intervals the calendar is divided into, make the adjustment with the **Time Interval** drop down list.

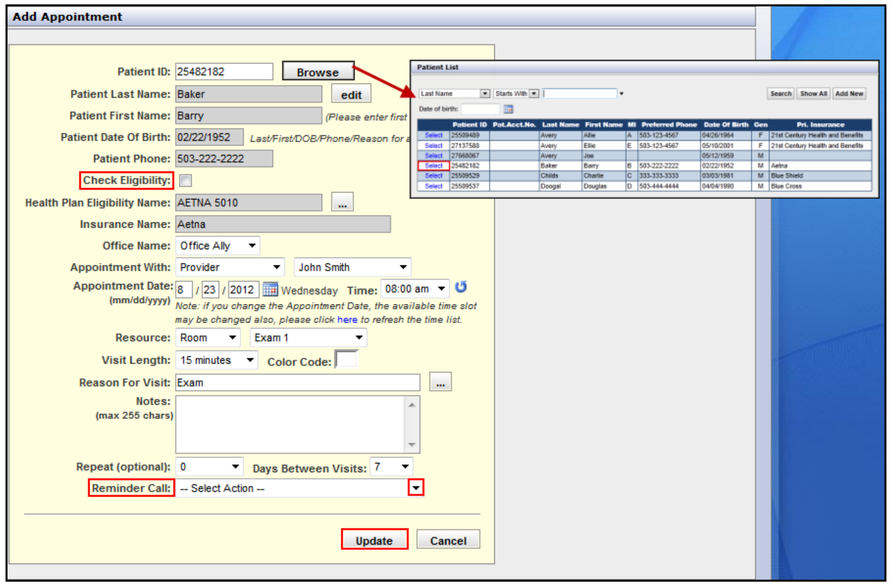

There is a search feature as well, below the Office and Provider filters. Type a specific date you would like to view into the provided boxes. You can also click on the calendar icon, , to choose a date from the pop-up that will display. Once you have selected a date, click **Go To Date**, and the schedule for that date will be displayed. If you want to view the current date, click **Today**, and current day's schedule will display.

## *Appointments Tab>Add New Appointment*

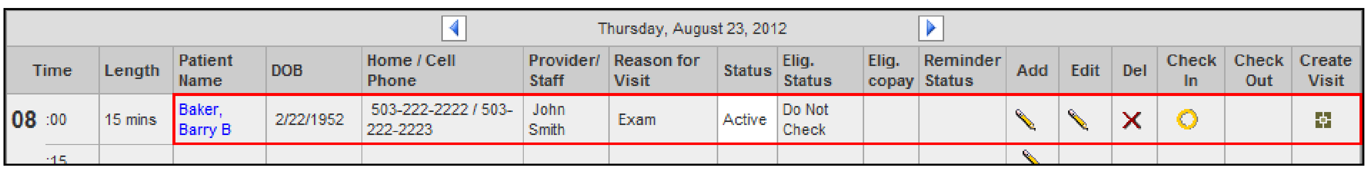
The **Add New Appointment** link will display the **Add Appointment** page.


Click the **Browse** button to search through your patient list. Use the search criteria to narrow your list and find your patient. Enter the appointment information, and click **Update** when finished.

**Note**: The **Check Eligibility** and **Reminder Call** options will only function if you have enrolled in those add-on services.




The appointment will now appear on your calendar on the scheduled day.



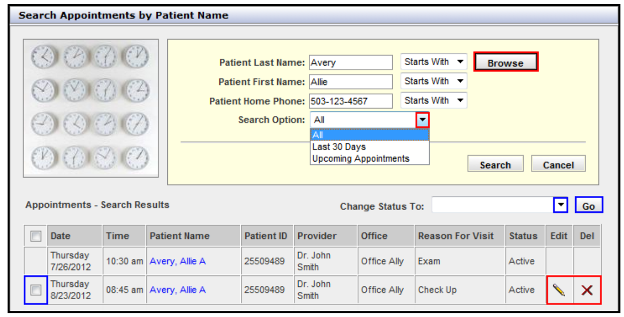

From this view, you have access to a great deal of information.

- Click on the patient's name, and you will be directed to the **Manage Patients Tab**, where you can edit Patient Data and their Insurance information.
- Click the icon in the **Add** column, , to access the **Add Appointment** page again. Use caution, as you could double-book an appointment if the availability has not been confirmed from the calendar view.
- The icon in the **Edit** column, , will allow you to change the appointment.
- The icon in the **Del** column, , will delete the appointment.
- The icon in the **Check In** column, , will allow you to record the patient's Check In information and create a corresponding Visit for billing purposes.
- An icon in the **Check Out** column, , will appear after the patient has been checked in. This will allow you to record the patient's Check Out information.
- The icon in the **Create Visit** column, , will open the **Patient Visit Tab**, to add a new visit.

## *Appointments Tab>Search*

The search function will allow you to search for appointments by a patient's name. This is helpful when checking date/time for a patient without having to search through the calendar. Click the **Search** link to start.

There are different ways to search for a patient from this screen. One way is to type the patient's first or last name into the fields, and click **Search**. Another way is to enter the patient's phone number they have on file and click **Search**. The last way is to use the **Browse** button, and select a patient from your Patient List. This will populate all the information for you. Click **Search**. The results will display at the bottom of the screen.

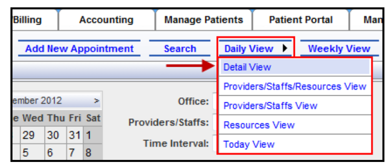



To narrow your results, use the **Search Option** filter. Choose to only display appointments from the last 30 days, or only display upcoming appointments. After you make your choice, click **Search** again.

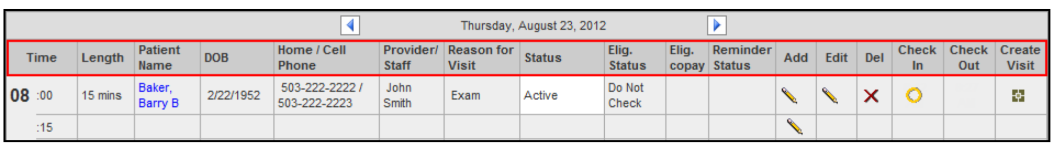
The results will include different options for past or upcoming appointments. Any past appointments are simply recorded. There is no way to edit or change them in any way from this screen. Upcoming appointments are available to edit or delete with the icons in the right columns. Change the status of the appointment or patient by checking the box in the left column next to the desired appointment result, and choose an action from the **Change Status To** drop down list. Click **Go** to apply changes. Click on the patient name to access their record.

## CHANGING CALENDAR VIEWS

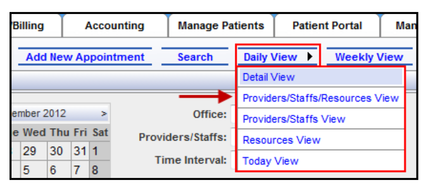
### *Appointments Tab>Daily View>Detail View*



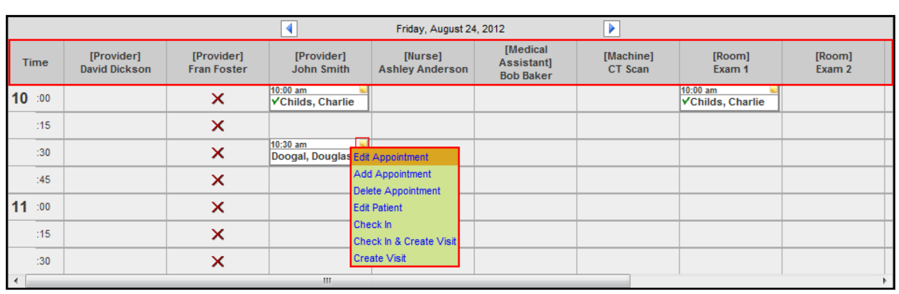

Hover your mouse over the **Daily View** link, and select **Detail View**. This view is the default setting, but can also be customized. This will give contact information on the patient, as well as direct links to adding patient visits and check-in/check-out sections. This view is useful to see a particular day's overall schedule. To edit or change any appointment information, click on the icon in the **Edit** column.




### *Appointments Tab>Daily View>Providers/Staff/Resources View*




Hover your mouse over the **Daily View** link, and select **Providers/Staff/Resources View**. This view allows you to see what time, what providers/staff, and what resources are available on one screen. The appointment will appear in each of the sections they are scheduled for. For instance, notice Charlie Childs appears under both **[Provider] John Smith**, and **[Room] Exam 1** columns. At a quick glance, someone scheduling another appointment would see that Dr. Smith and Exam 2 are taken at 10am.



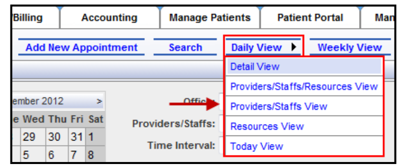

Under this view, you are still able to get to the patient information. There is a yellow icon, , in the top right corner of each appointment box. By hovering your mouse over this icon, a list will appear to manage the patient and appointment information, as shown on the right. This yellow icon will appear in all the views except the **Daily** and **Detail Views**. The list that displays mimics the icons shown in the **Daily** and **Detail Views**.

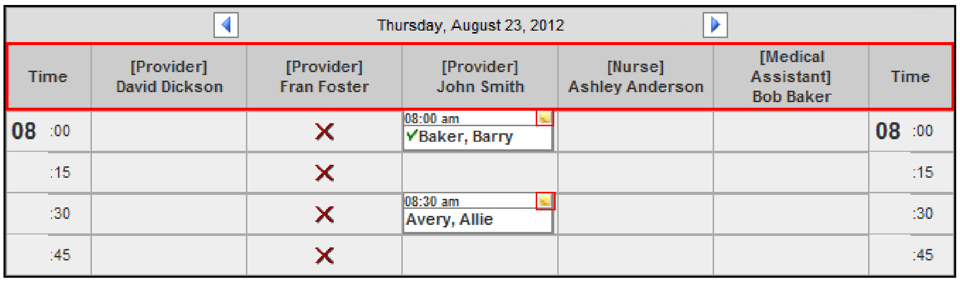
If you want to change the date/time of any of the appointments in any of the views besides the **Daily** or **Detail View**, you are able to click and drag the appointment to a new time/date/provider and/or resource box to change the appointment. The adjustments will be made automatically in the patient record.

**Note**: As in the figure above, there may be more Providers/Staff/Resources listed than can be viewed at one time. Move the scroll bar horizontally at the bottom of the page to view everything listed.

### *Appointments Tab>Daily View>Providers/Staff View*

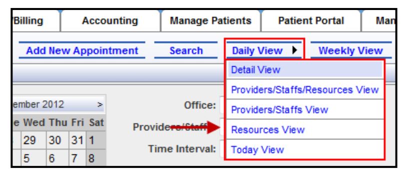
This is similar to the **Providers/Staff/Resources View**, but does not include the Machines or Rooms. This would be used to quickly see which staff or providers were available. The appointments will have the yellow icon available for more detailed information.

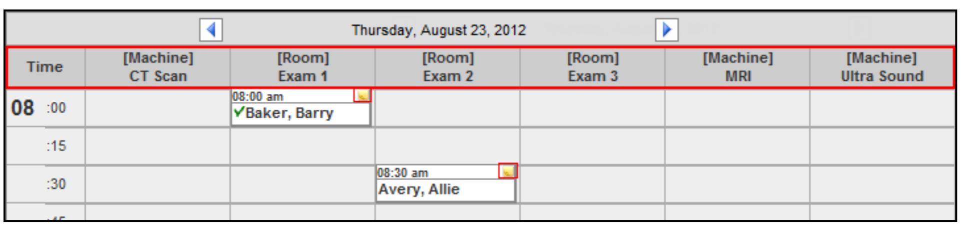



### *Appointments Tab>Daily View>Resource View*

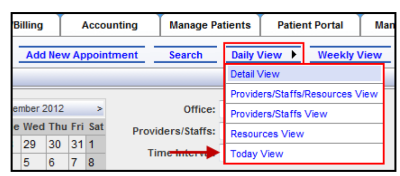
This view only shows the Machines and Rooms. The providers and staff are not listed. If a quick view of what resources are available is needed, use this view. The appointments will have the yellow icon available for more detailed information.

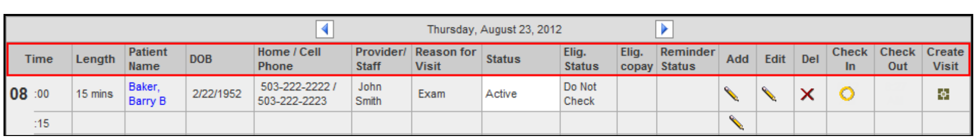



### *Appointments Tab>Daily View>Today View*

This selection includes the same information and set up as the **Detail View** for the current date. If you wanted to see in detail the appointments for a day in the future, you would use the **Detail View**. If you wanted to see the current day, use this option.




### *Appointments Tab>Weekly View*

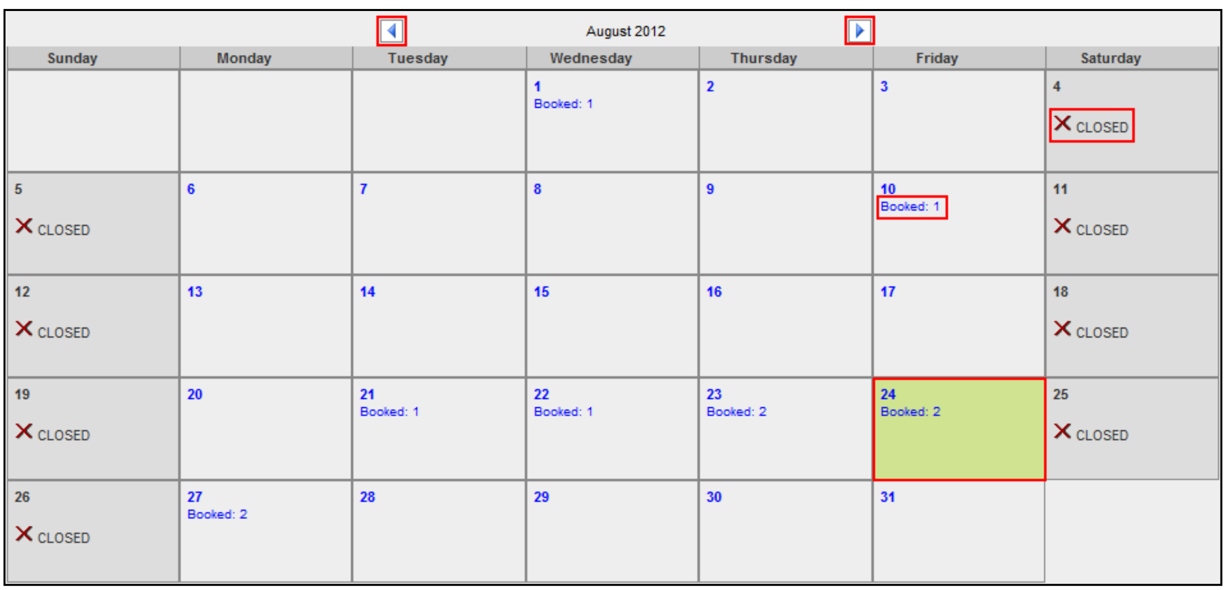
This option will display the schedule for seven days.

The X's in certain time slots indicates the office is closed at those times. The calendar on the upper left will indicate the current date, which corresponds with the highlighted day on the **Weekly View**. The appointments will have the yellow icon available for more detailed information.


*Appointments Tab>Monthly View*

This view displays a monthly calendar with a summary of the number of appointments booked each day. Notice the **Monthly View** also displays when the office is closed.


The days with appointments will list the number scheduled. You can click on the **Booked** link, and the **Detail View** will open for that day, displaying the specific appointments. The current date will be highlighted. You can adjust which month you are viewing by using the arrows on the top of the monthly calendar view.

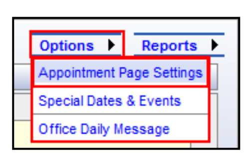



## CUSTOMIZING THE APPOINTMENTS CALENDAR

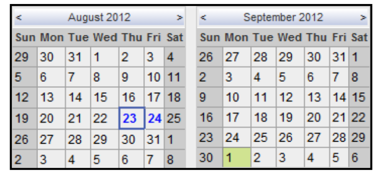
*Appointments Tab >Options>Appointment Page Settings*

The **Options** link allows you to make selections that will change your default view on your **Appointments Tab**. The link provides a menu of options to customize your calendar view, block times, and create Office Messages. These settings are user specific, so each user can customize their own account without affecting other users.

To customize your settings, hover your mouse over the **Option** link at the top of the page, and click **Appointment Page Settings** from the sub-menu.



A new menu will appear, in which you can change mulitple default view aspects, which effect how your **Appointments Tab** is displayed.

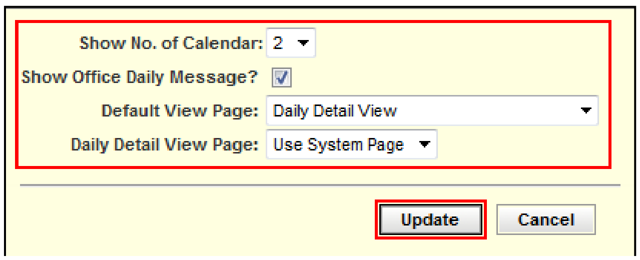



- **Show No. of Calendar**- Choose between one or two monthly calendars to be displayed above your appointment schedule.

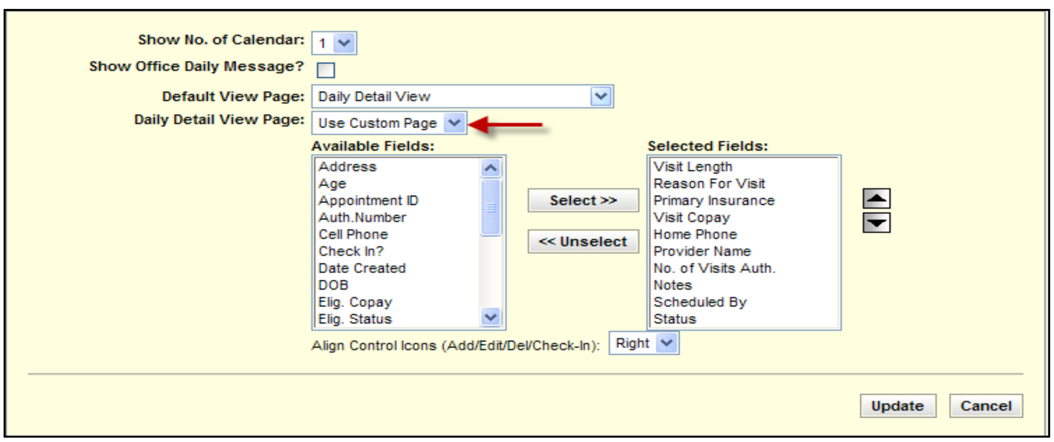
- **Show Office Daily Message-** Choose to display the daily message for the office above your schedule.

- **Default View Page-** Select the default view you would like see on the **Appointments Tab**.

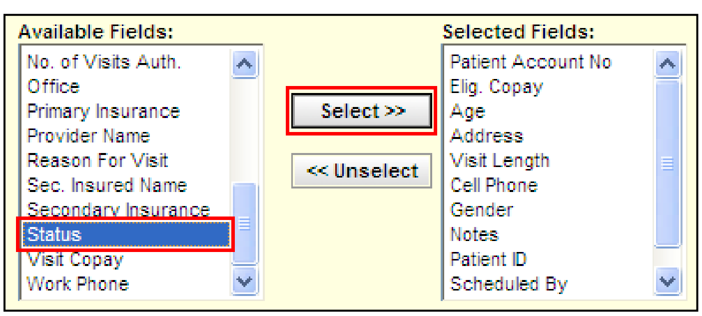
- **Daily Detail View Page-** Switch between the default **Daily Detail View** page or create your own custom layout.
  - If you want to use the default **Daily Detail View**, make sure you have **Use System Page** selected on the drop down menu as indicated below. This will be the default setting. To create a custom view, use the drop down list to select **Use Custom Page**.

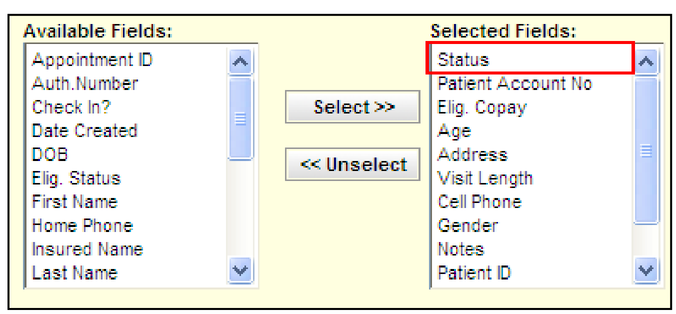



If you select **Use Custom Page**, new fields will appear on the page, and you will have an option to select the fields you wish to be displayed in your **Daily Detail View**. The **Available Fields** and **Selected Fields** that appear will already have selections in them.

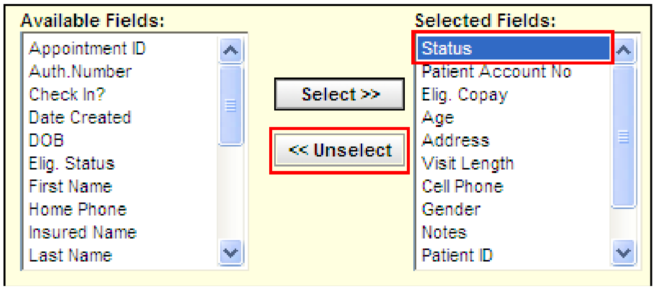


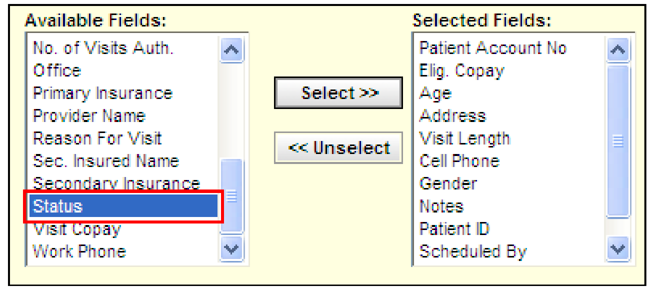

To add fields into the **Daily Detail View,** click on a field in the **Available Fields** box, and click **Select**. The field moves from the **Available Fields** to **Selected Fields** category, and will appear on your calendar view.



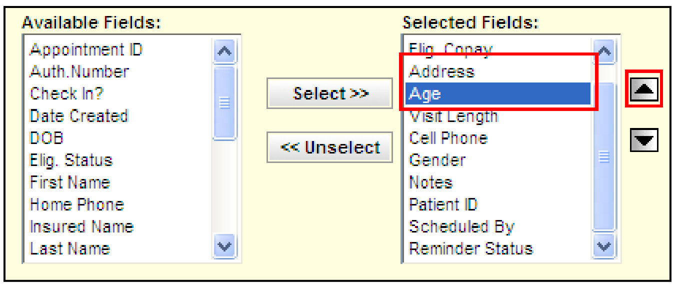



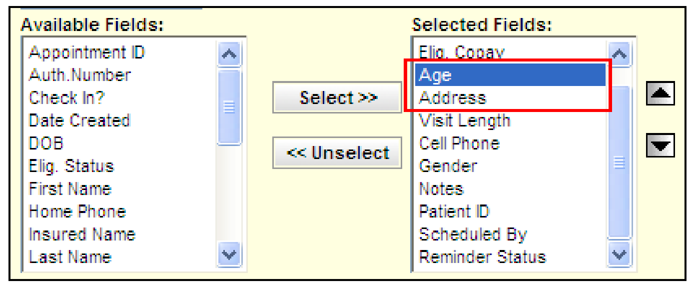
To remove an entry in the **Selected Fields** box, highlight the field you want removed and click **Unselect**. The field will move over from **Selected Fields** to the **Available Fields** box.




If you wanted to change the order of the fields displayed on your **Daily View**, use the arrows next to the **Selected Fields** box. Select the field you want to change the position of, and use the arrows to move it up or down on the list.




Notice in the figures below how the rank in the **Selected Fields** box (Figure 1) determines the layout on the **Daily Detail View** (Figure 2).

**Figure 1**

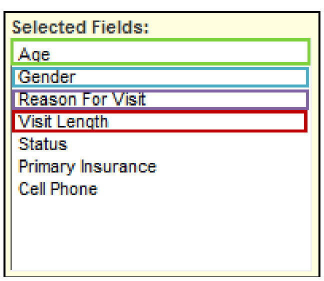
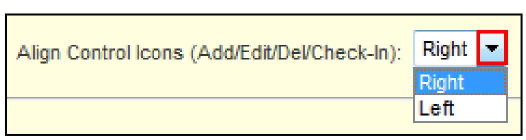



**Figure 2**

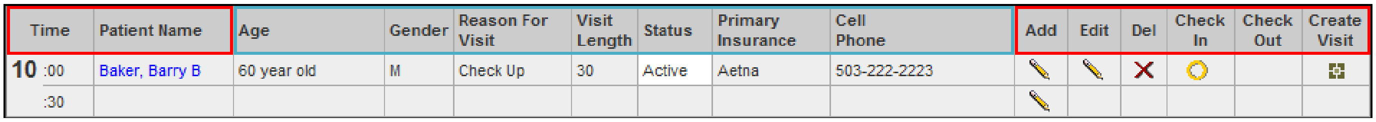

**Note**: There are default fields that you cannot change or delete. These can be set on the left or right of the page with the **Align Control Icons** option. **Time**, **Add**, **Edit**, **Del**, **Check In**, **Check Out**, **Create Visit**, and **Patient Name** will always appear.




Once you have the **Selected Fields** box adjusted, click **Update** to save your changes.

**Note**: If you have several selections, you may have to scroll horizontally across the appointment chart to see the additional fields.

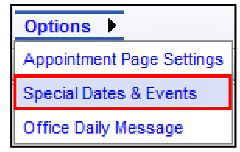
A sample **Daily Detail** screen with **Custom Page** settings is illustrated below. The **Align Control Icons** option is set to align on the **Right**. The columns highlighted in red are the default settings which cannot be changed. The columns highlighted in blue are the custom view options each user can select. There may be more fields than can be viewed at one time. If the selected fields do not fit into the view all at once, there will be a scroll bar at the bottom of the screen to scroll horizontally.



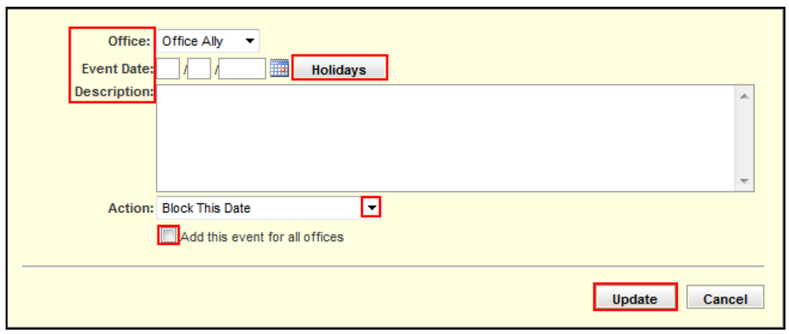
| Time | Patient Name | Age | Gender | Reason For Visit | Visit Length | Status | Primary Insurance | Cell Phone | Add | Edit | Del | Check In | Check Out | Create Visit |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 10 :00 | Baker, Barry B | 60 year old | M | Check Up | 30 | Active | Aetna | 503-222-2223 | | | | | | |
| :30 | | | | | | | | | | | | | | |

## *Appointments Tab>Options>Special Dates & Events*

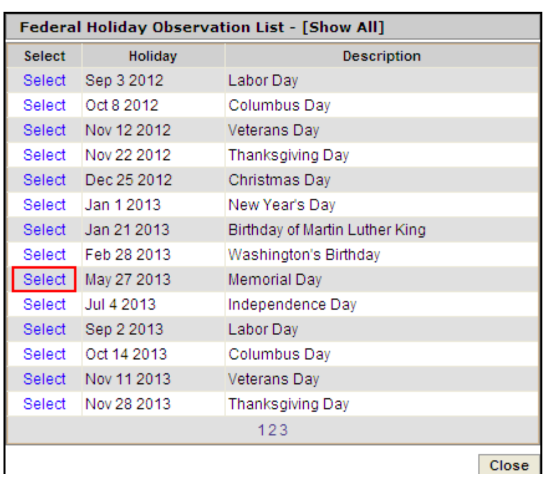
Creating **Special Dates & Events** for your office or for individual staff members allows you to block out time for reasons other than patient appointments. For example, this could be used to prevent accidental scheduling during a meeting for the office, or a staff member out of the office on vacation. To set up a special date or event, hover over the **Options** link and select **Special Dates & Events** from the drop down menu.




Select **Add Office Event**. There will be an **Office** drop down box to select the office location you will be blocking the schedule for. Choose the **Event Date** by typing the date into the boxes, use the calendar icon, , or click on the **Holidays** button. The calendar icon will display a calendar pop-up. Click the date on the calendar to choose the date. It will populate the date boxes. The **Holidays** button will create a pop up with all the major holidays listed.




When you find the holiday you want, click **Select**. The **Event Date**, as well as the **Description**, will populate into the appropriate places.

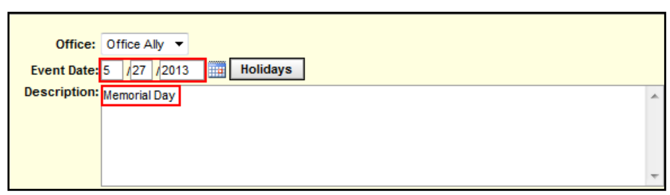


Federal Holiday Observation List - [Show All]

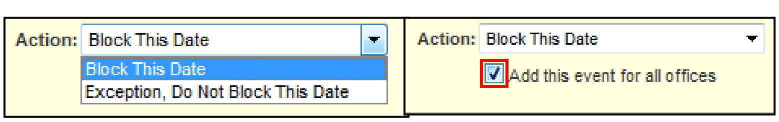
| Select | Holiday | Description |
|---|---|---|
| Select | Sep 3 2012 | Labor Day |
| Select | Oct 8 2012 | Columbus Day |
| Select | Nov 12 2012 | Veterans Day |
| Select | Nov 22 2012 | Thanksgiving Day |
| Select | Dec 25 2012 | Christmas Day |
| Select | Jan 1 2013 | New Year's Day |
| Select | Jan 21 2013 | Birthday of Martin Luther King |
| Select | Feb 28 2013 | Washington's Birthday |
| Select | May 27 2013 | Memorial Day |
| Select | Jul 4 2013 | Independence Day |
| Select | Sep 2 2013 | Labor Day |
| Select | Oct 14 2013 | Columbus Day |
| Select | Nov 11 2013 | Veterans Day |
| Select | Nov 28 2013 | Thanksgiving Day |

1 2 3

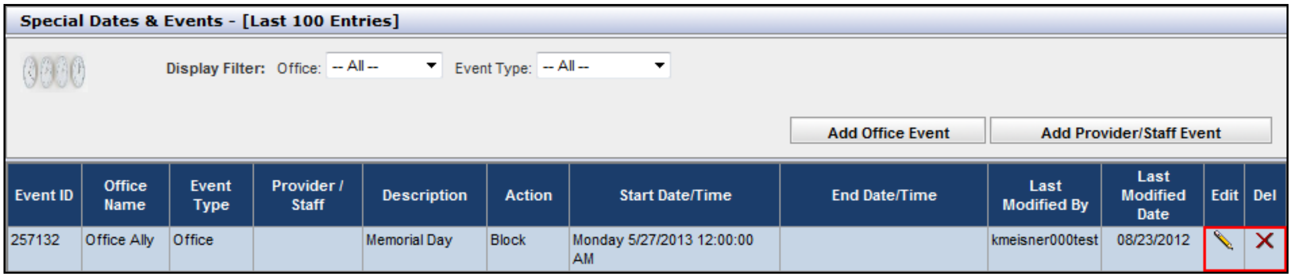
Close




Select the action you'd like to apply to this event. Use the drop down box to make your selection. If you have multiple offices, you can create an event one time, and apply it to all of the offices by checking the **Add this event for all offices** box.



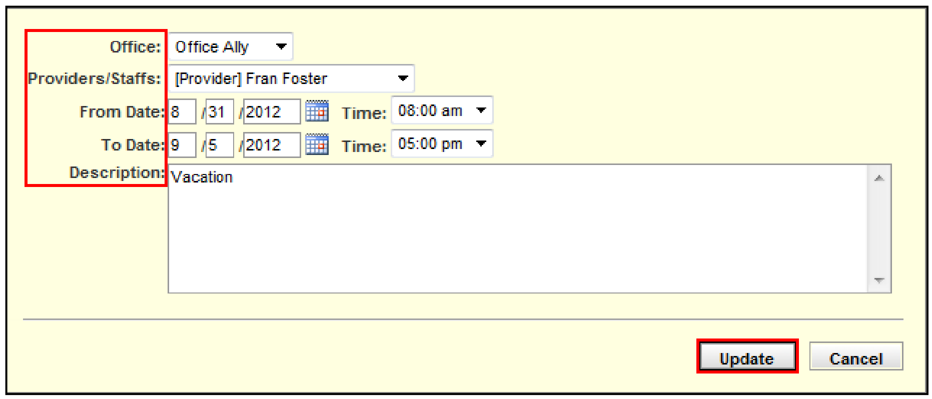
Click **Update** when you have finished creating your event. The event will now appear in your **Special Dates & Events** List. You will be able to see various details about the event, as well as options to edit or delete the event, with the icons on the far right.



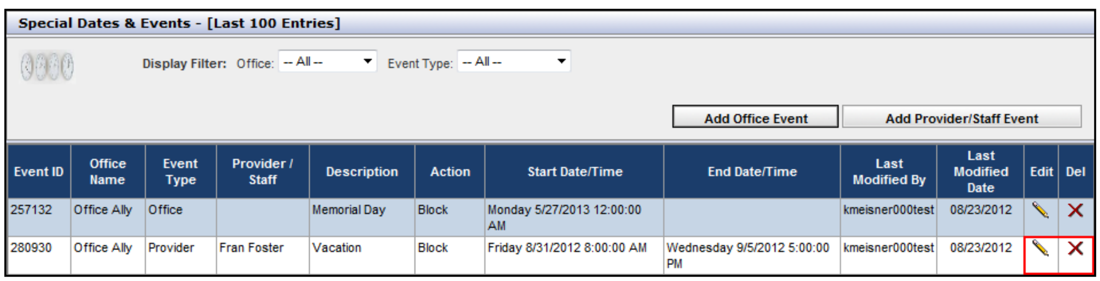

| Event ID | Office Name | Event Type | Provider / Staff | Description | Action | Start Date/Time | End Date/Time | Last Modified By | Last Modified Date | Edit | Del |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 257132 | Office Ally | Office | | Memorial Day | Block | Monday 5/27/2013 12:00:00 AM | | kmeisner000test | 08/23/2012 | | |

The **Add Provider/Staff Event** button allows you to block part, all, or multiple days for an individual.

Choose an office location. The **Providers/Staffs** drop down list will default to alphabetical order. Use the list to choose a staff member. Type the desired **From Date** into the boxes, or use the calendar icon, , to click on a date. Select the **From Time** from the drop down list. Fill in the **To Date** and **Time** in the same way. Include a **Description**, and click **Update**.

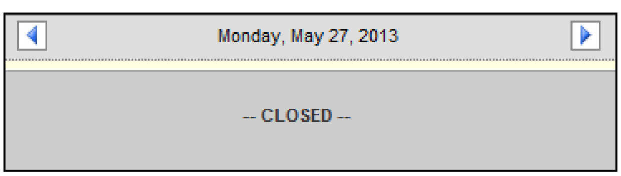


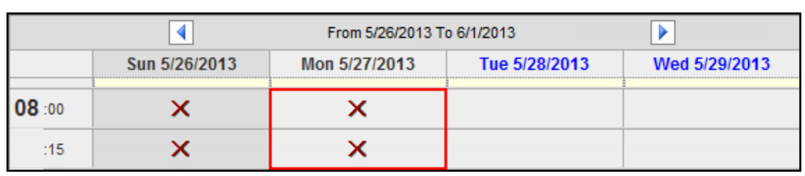

The events will be listed on your **Special Dates & Events** page.

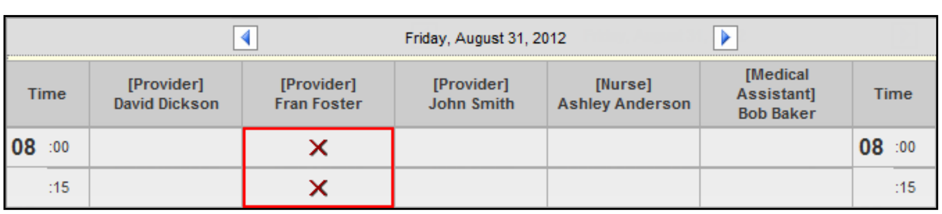



| Event ID | Office Name | Event Type | Provider / Staff | Description | Action | Start Date/Time | End Date/Time | Last Modified By | Last Modified Date | Edit | Del |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 257132 | Office Ally | Office | | Memorial Day | Block | Monday 5/27/2013 12:00:00 AM | | kmeisner000test | 08/23/2012 | | |
| 280930 | Office Ally | Provider | Fran Foster | Vacation | Block | Friday 8/31/2012 8:00:00 AM | Wednesday 9/5/2012 5:00:00 PM | kmeisner000test | 08/23/2012 | | |

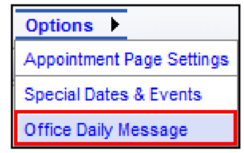
On your **Appointments Tab**, you can see the changes just made on your calendars. Depending on the view you choose, the messages will be indicated differently.



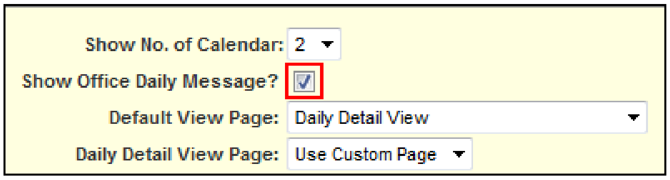



## *Appointments Tab>Options>Office Daily Message*

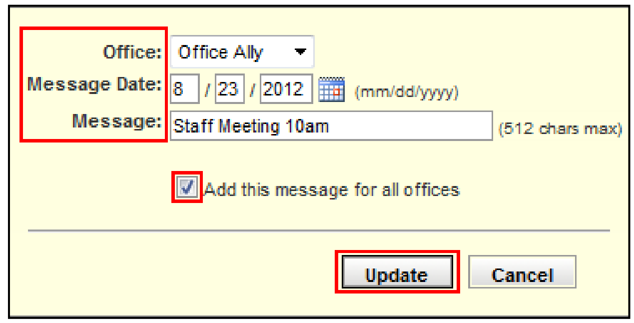



A **Daily Message** can appear on the appointments calendar to give reminder notices to staff as shown below. In order for the message to display, each user must make sure the **Show Office Daily Message** box is checked in ***Appointments Tab>Options>Appointment Page Settings***.



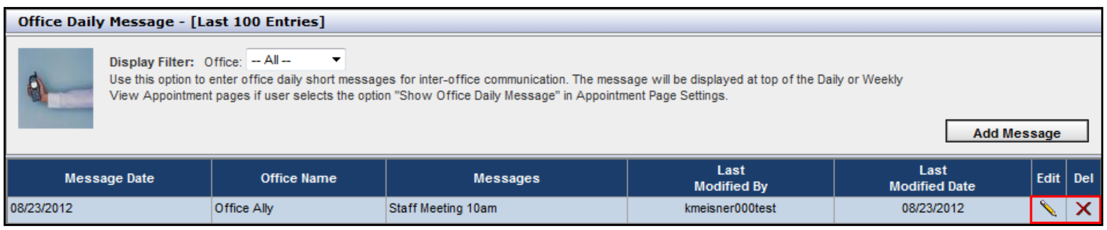


To create a message, click the **Office Daily Message** link under **Options**. Select the office from the **Office** drop down list. The date will default to the current date. Use the date fields or calendar icon, , to make your selection of when the message will display. Type your message on the **Message** line. There is a 512 character limit. If you'd like the message to appear for all offices, check the box for **Add this message for all offices**. Click **Update**.

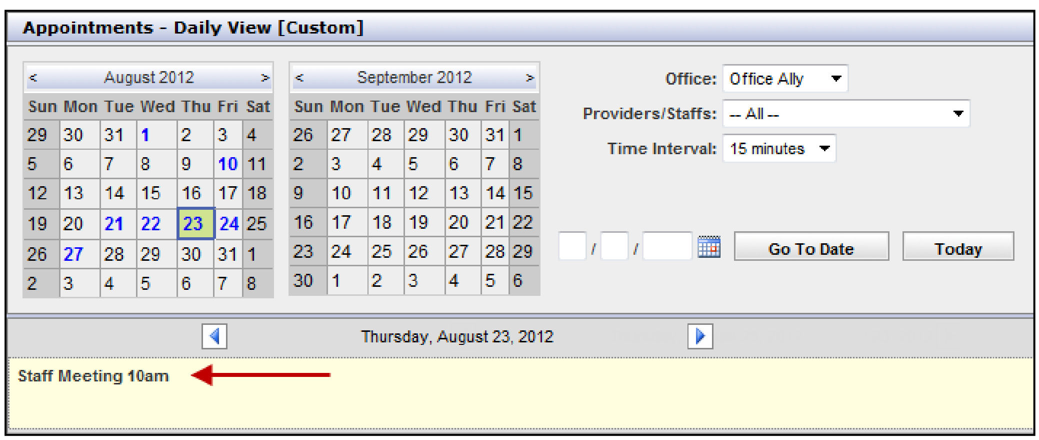



Your new entry will now appear on the **Office Daily Message** list.

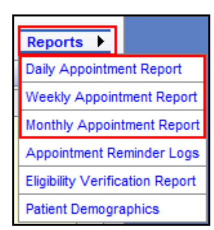
You can edit or delete this message at any time with the icons on the far right.




The **Office Daily Message** will now appear on the **Appointments Tab** above the calendar view.

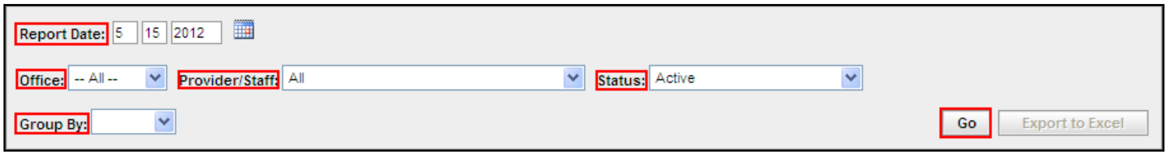



## *Appointments Tab>Reports*




The **Reports** link provides sub-links of available reports. The **Appointment Reports** (Daily, Weekly, and Monthly) allows you to generate reports and print or save them. The information in the reports comes from the information in your **Appointments Tab** schedule.

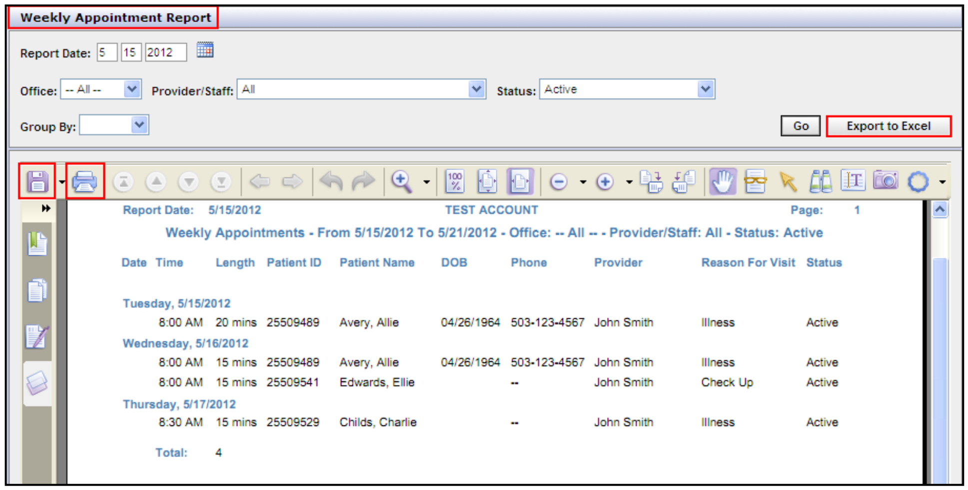
The **Daily**, **Weekly** and **Monthly Appointment Reports** may be filtered by **Report Date**, **Office**, **Provider/Staff** and **Status**, and the **Weekly** and **Monthly** reports give you the option to **Group By** Office or Provider. This information can be useful not only to provide a snapshot of activities, but to follow up with patients on missed appointments, cancellations, and to view trends in reasons for patient visits. Once you select all your desired filter criteria, click the **Go** button.




**Note**: Once the report has been generated, you will be able to choose **Export to Excel** to convert the report to a spreadsheet format.

The report will generate below the search criteria. Print, save, or export the report.

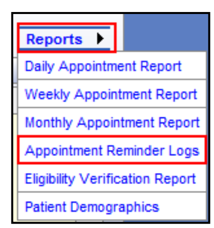
**Note**: The reports will look different depending on the PDF viewer you have installed on your computer.



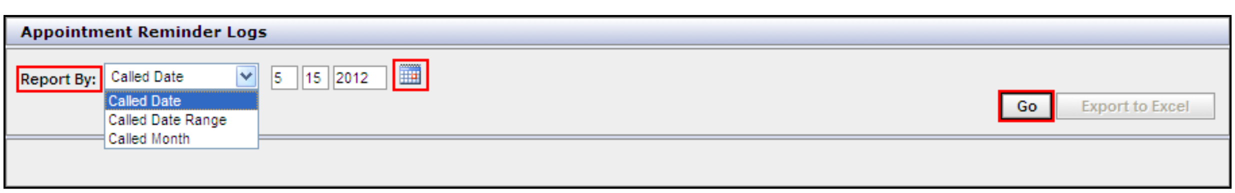

## *Appointments Tab >Reports>Appointment Reminder Logs*

The **Appointment Reminder Log** report is specific to **Reminder Mate**. This is an add-on service which will make automated phone calls to remind patients of upcoming scheduled appointments. Using Reminder Mate will help you to reduce missed appointments, receive appointment confirmations or cancellations, and process re-schedule requests automatically. For more information, call the Enrollments Department at 866-575-4120, option 3.

To view this report, hover over **Reports** and click on **Appointment Reminder Logs** in the sub menu.



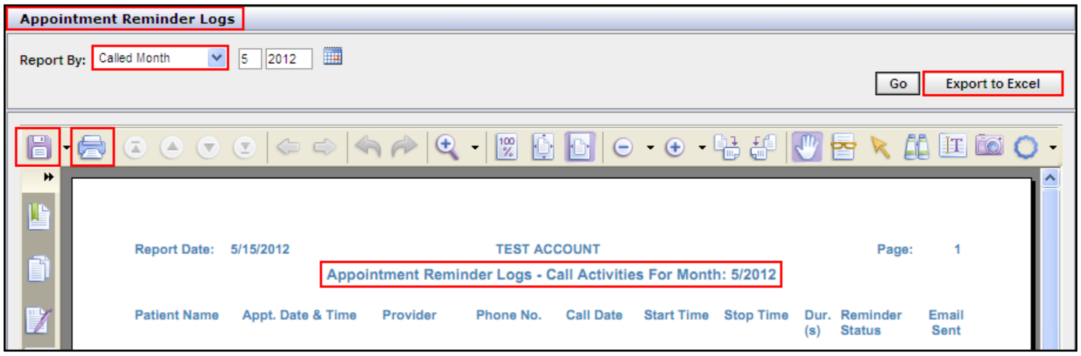

You can then generate a report based on **Called Date**, **Called Date Range**, and **Called Month**. Use the calendar icon to select dates or manually enter them into the text fields. Click **Go** to generate a report which will appear below the filtering criteria.




**Note**: Once the report has been generated, you will be able to choose **Export to Excel** to convert the report to a spreadsheet format.

The report will generate below the search criteria. Print, save, or export the report.

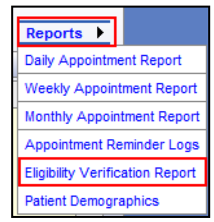
**Note**: The reports will look different depending on the PDF viewer you have installed on your computer.



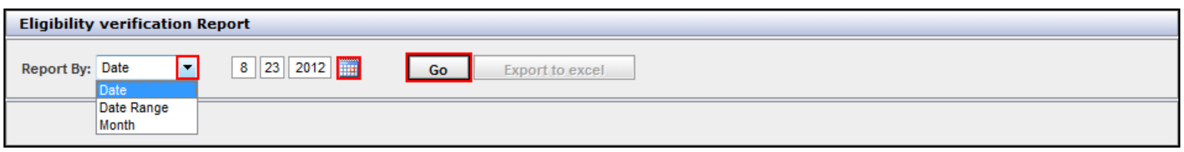

### *Appointments Tab>Reports>Eligibility Verification Report*

The **Eligibility Verification Report** is specific to the **Eligibility Verification** add-on service, which checks patients' insurance information in real time to confirm eligibility and benefits. For more information, call the Enrollments Department at 866-575-4120, option 3.

To view this report, hover over **Reports** and click on **Eligibility Verification Report** in the sub menu.



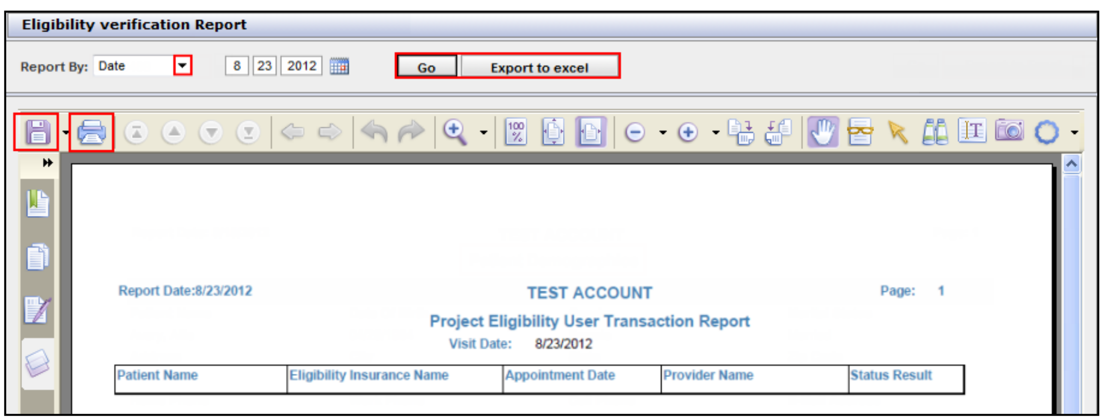

You can then generate a report based on **Date**, **Date Range**, or **Month**. Use the calendar icon to select dates or manually enter them into the text fields. Click **Go** to generate a report which will appear below the filtering criteria.




**Note**: Once the report has been generated, you will be able to choose **Export to Excel** to convert the report to a spreadsheet format.

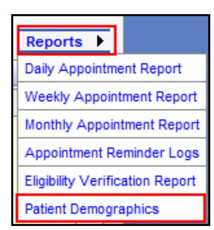
The report will generate below the search criteria. Print, save, or export the report.

**Note**: The reports will look different depending on the PDF viewer you have installed on your computer.

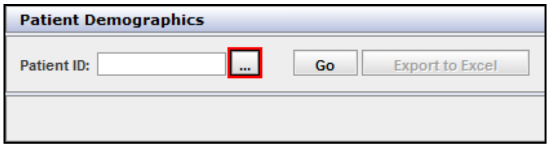


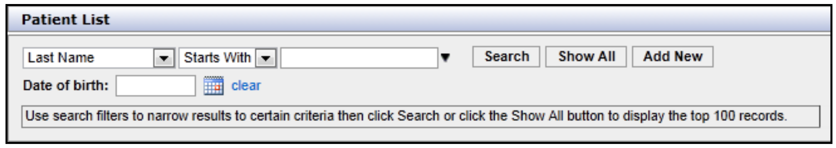

### *Appointments Tab >Reports>Patient Demographics*

The **Patient Demographics** report allows you to generate a report for a specific patient's demographic, guarantor, and insurance information. To generate this report, hover over the **Reports** link, and select **Patient Demographics** from the sub-menu.

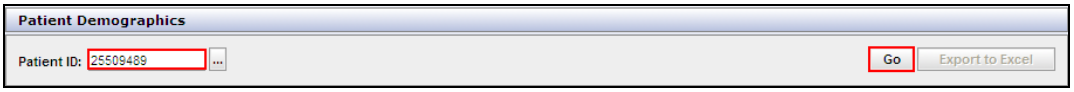


Select a patient with the Search button, ⋯. A pop-up screen will appear, allowing you to search for your patient. Enter search criteria, or click **Show All** to display the first 100 results. Click **Select** for the patient you want to run the report on.



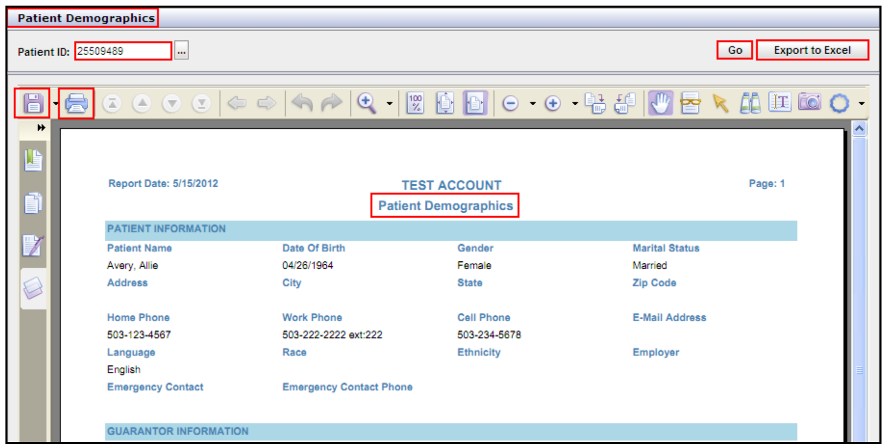

The **Patient ID** will populate into the field. Click the **Go** button to generate the report.




**Note**: Once the report has been generated, you will be able to choose **Export to Excel** to convert the report to a spreadsheet format.

The report will generate below the search criteria. Print, save, or export the report.

**Note**: The reports will look different depending on the PDF viewer you have installed on your computer.

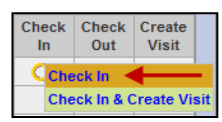



## USING THE APPOINTMENTS TAB

### *Appointments Tab>Check In*

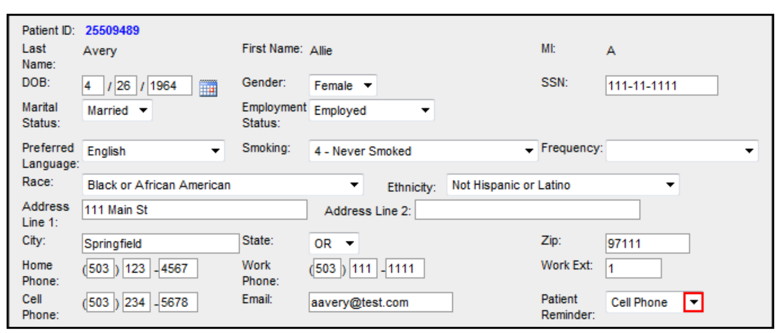
If using the **Detail** or **Today View**, the **Check In** column will have a yellow icon when the appointment appears on the appointment calendar. There are two options. Hover your mouse over the icon, and a menu will display, **Check In** and **Check In & Create Visit**. When the patient is ready to be checked in, choose one of the options by clicking on it.

The **Check In** option will be a basic process, with only the necessary information. Patient information, Insurance information, payment, and check in time. Click the **Check In** option to begin.

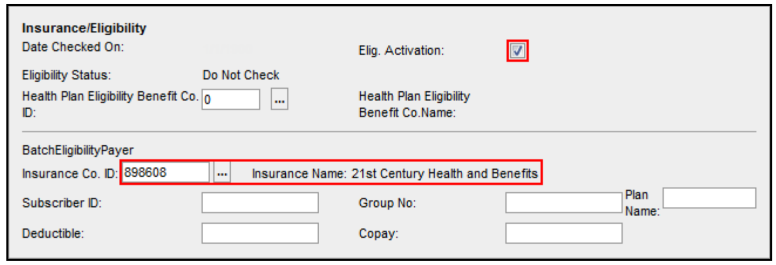



**Note**: Any changes made here will update the record in Manage Patients as well.

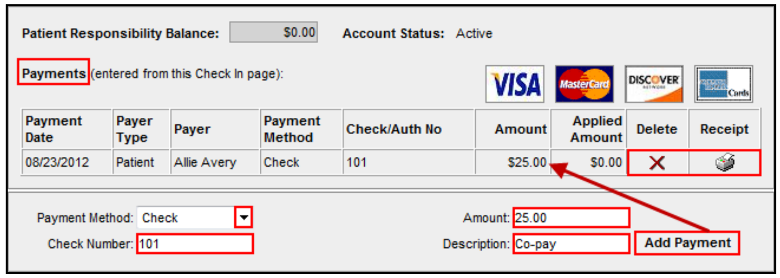
You will be directed to the Check In screen. If you are checking in an existing patient with a complete record, much of the information will be populated for you. If any patient information needs to be edited, you may make any changes necessary from this screen. If you have enrolled in the add-on service Reminder Mate, select the preferred phone number of the patient to receive those calls.



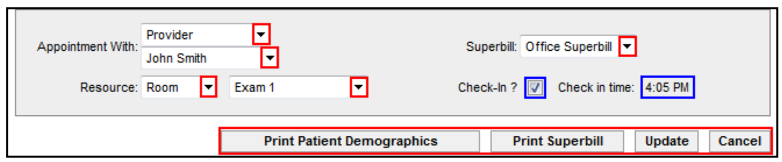
In the next section, review the insurance information you have on file for the patient, and adjust if necessary. If you have enrolled in the add-on service Eligibility Verification, you can activate the verification for this patient by checking the **Elig. Activation** box. The **Insurance Co. ID** will display the ID number, and list the **Insurance Name** for reference. Enter any other necessary information.



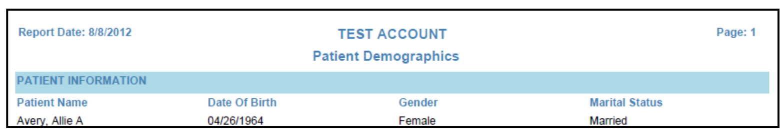

The third section allows you to record a payment and print a receipt. Select the **Payment Method** from the drop down list, enter the **Amount** and a **Description**, and click **Add Payment**. The payment information will display above the fields. From the **Payments** section, you can click the icon in the **Delete** column to remove the payment record, or click the icon in the **Receipt** column to print a receipt for the patient. Any payments added in this way will automatically record in the **Accounting Tab** to be applied later.



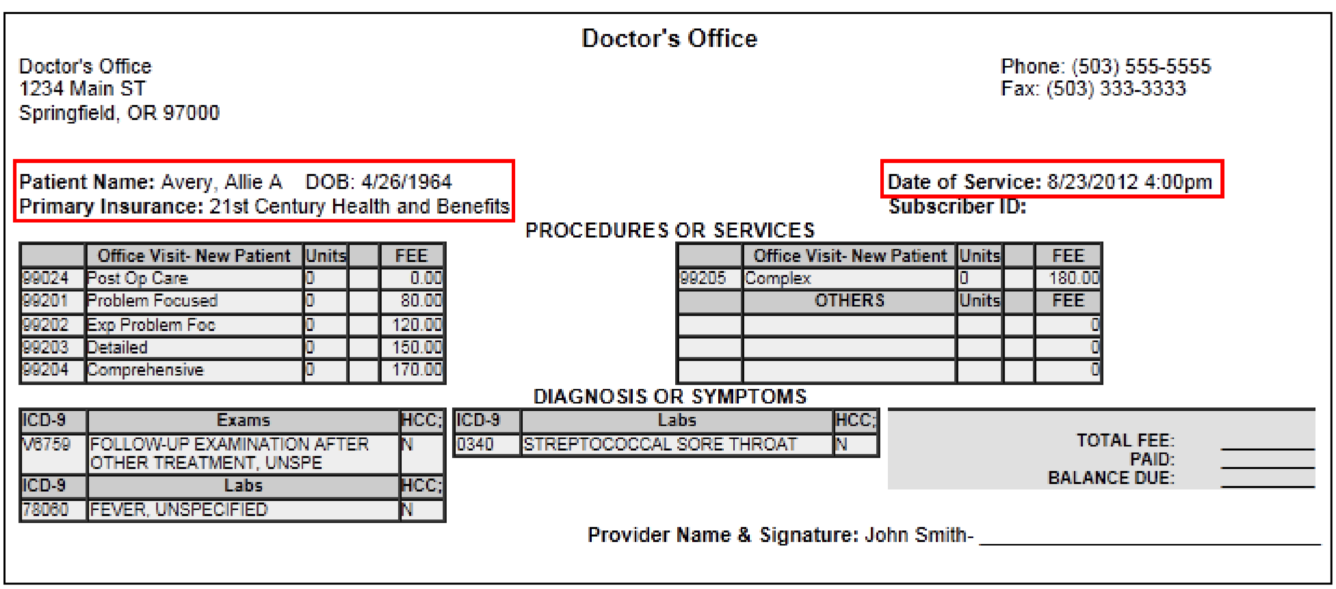

The last section confirms the provider or staff member the patient will see, and designates any resources being used. Use the drop down list to select a room or machine. If you have multiple Superbills, you may choose the applicable one for this patient or the provider from this screen. Check the box next to **Check-In?** and the **Check in time** will automatically record.




The **Print Patient Demographics** button will give you the choice to open or save a PDF file of the patient's demographic information. You can save or print this PDF once it has been opened.




The **Print Superbill** button will print the selected Superbill, with the patient's information already included.



**Doctor's Office**

Doctor's Office
1234 Main ST
Springfield, OR 97000

Phone: (503) 555-5555
Fax: (503) 333-3333

**Patient Name:** Avery, Allie A **DOB:** 4/26/1964
**Primary Insurance:** 21st Century Health and Benefits

**Date of Service:** 8/23/2012 4:00pm
**Subscriber ID:**

**PROCEDURES OR SERVICES**

| | Office Visit- New Patient | Units | | FEE |
|---|---|---|---|---|
| 99024 | Post Op Care | 0 | | 0.00 |
| 99201 | Problem Focused | 0 | | 80.00 |
| 99202 | Exp Problem Foc | 0 | | 120.00 |
| 99203 | Detailed | 0 | | 150.00 |
| 99204 | Comprehensive | 0 | | 170.00 |

| | Office Visit- New Patient | Units | | FEE |
|---|---|---|---|---|
| 99205 | Complex | 0 | | 180.00 |
| | OTHERS | Units | | FEE |
| | | | | 0 |
| | | | | 0 |
| | | | | 0 |

**DIAGNOSIS OR SYMPTOMS**

| ICD-9 | Exams | HCC; |
|---|---|---|
| V6759 | FOLLOW-UP EXAMINATION AFTER OTHER TREATMENT, UNSPE | N |
| ICD-9 | Labs | HCC; |
| 78060 | FEVER, UNSPECIFIED | N |

| ICD-9 | Labs | HCC; |
|---|---|---|
| 0340 | STREPTOCOCCAL SORE THROAT | N |

TOTAL FEE: ______
PAID: ______
BALANCE DUE: ______

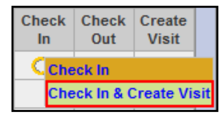
**Provider Name & Signature:** John Smith- ______________________

Click **Update** when finished to save the check in information, or **Cancel** to close without saving. The patient's name/appointment entry will now appear on the calendar with the time displayed in the **Check In** column for the **Daily** and **Detail Views**, or with a green check mark next to their name in the other views. The Check Out option will now become available.

| Patient Name | Age | Gender | Reason For Visit | Visit Length | Status | Primary Insurance | Cell Phone | Add | Edit | Del | Check In | Check Out | Create Visit |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Avery, Allie A | 48 year old | F | Check Up | 30 | Active | 21st Century Health and Benefits | 503-234-5678 | | | | 4:05 PM | | |

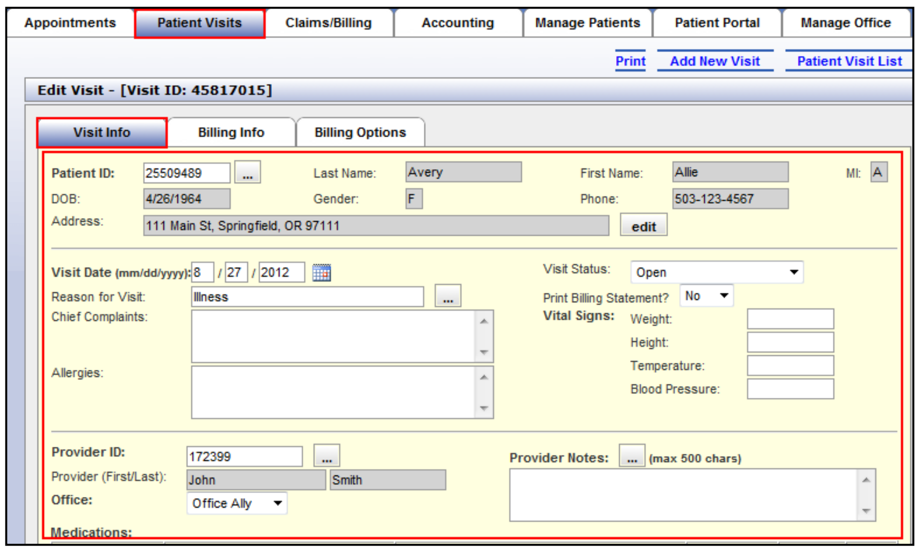

### *Appointments Tab>Check In & Create Visit*

This option allows you to check in the patient, as well as start creating the visit, all in one place. This can help save time on data entry. Hover your mouse over the Check In icon, and click on **Check In & Create Visit**.

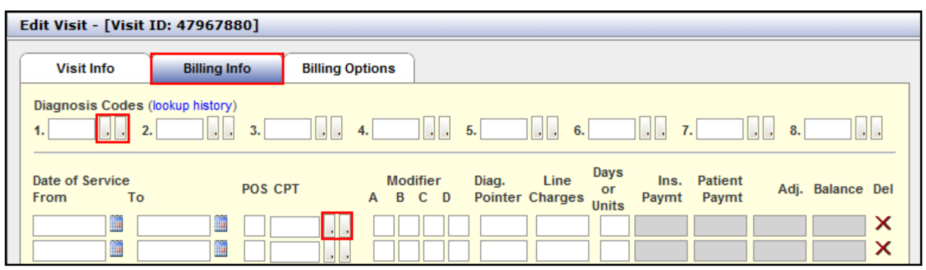



You will be directed to the **Patient Visits Tab** to the **Edit Visit** screen. Most information on the **Visit Info** tab will be completed. Enter any missing information, and click on the **Billing Info** tab.

**Note**: You DO NOT need to click **Update** before you move to the next tab within the window.



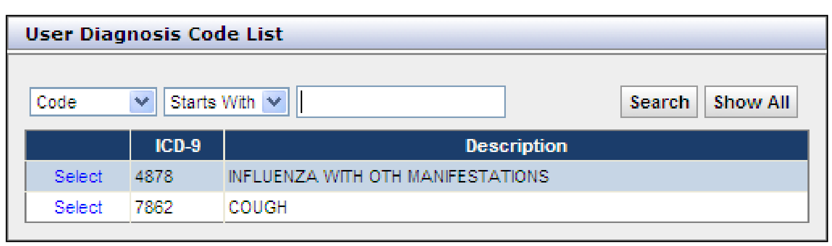

The **Billing Info** tab is where you will enter the information regarding the diagnosis and treatment or procedure performed, along with fees associated with the treatment or procedure.



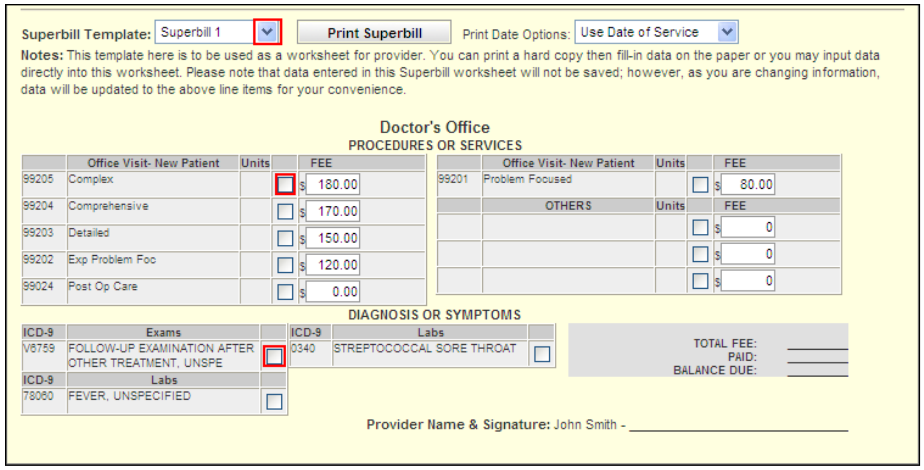

There are three ways to complete this screen:

1. You may manually enter information by typing in the screen.

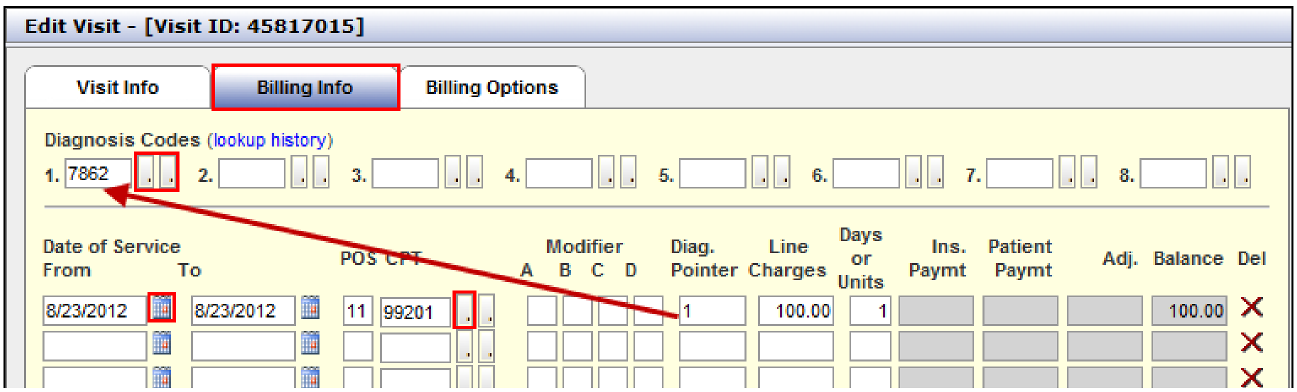
2. You may use the Search buttons, ..., to select from your User Defined lists of ICD-9 or CPT codes that you have created in the **Manage Office Tab**. This will populate the fields, including the date of service, with the exception of the diagnosis pointer(s).



3. If you scroll down the page, you may use any Superbills you've created. Use the drop down list for **Superbill Template** to make your selection, and the Superbill will display at the bottom of the screen. By selecting items from the Superbill, it will populate the fields, including the date of service, with the exception of the diagnosis pointer(s).



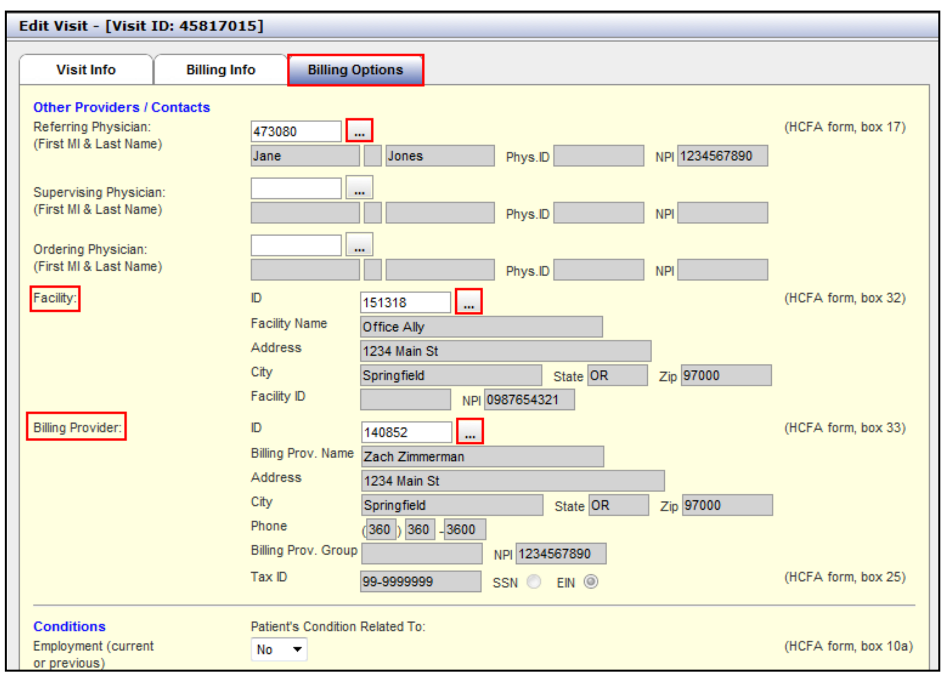

A completed screen is shown below. You may report up to eight diagnoses and 12 lines of treatment in a single visit. The Diagnosis Pointer refers to which diagnosis codes this procedure was done for. It references the box number next to the diagnosis code itself. In the example below it shows that this procedure was done because of the diagnosis code listed in box 1. If there were 2 diagnosis boxes filled out, the pointer would read "12." If you have multiple diagnosis pointers in one CPT box, add the pointers with no spaces or punctuation between them.




**Note**: You DO NOT need to click **Update** before you move to the next tab.

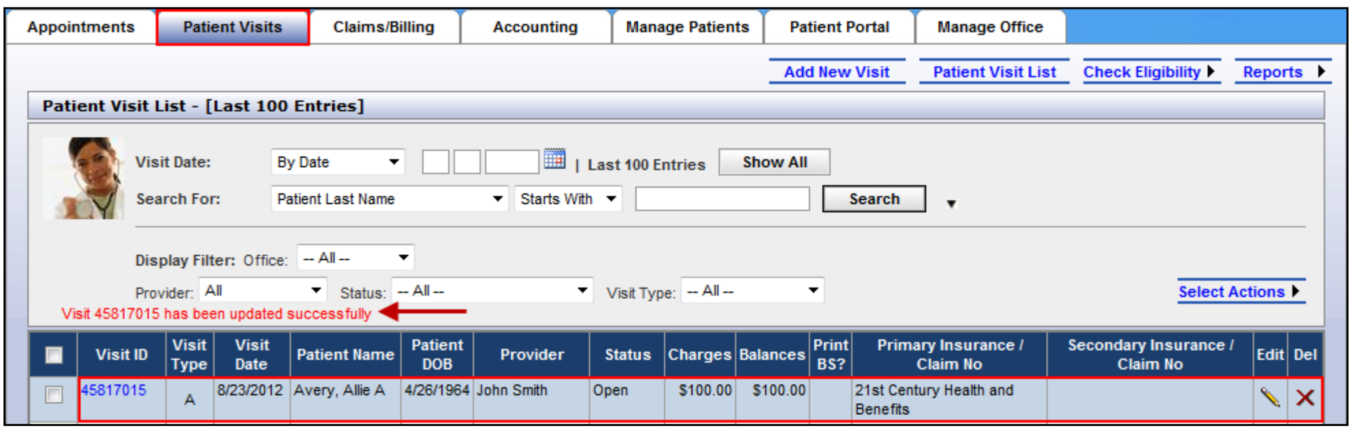
The **Billing Options** tab contains other information needed for billing. In this case, the patient has a Referring Physician on file in their record, so this information is already populated. The Facility and Billing Provider information can be defaulted in the **Manage Office Tab**, or you may use the Search buttons, ..., to select from your User Defined lists.

The **Update** button may be clicked on any page within the visit, and will save information present on all tabs. Click **Update** before leaving the **Edit Visit** page.



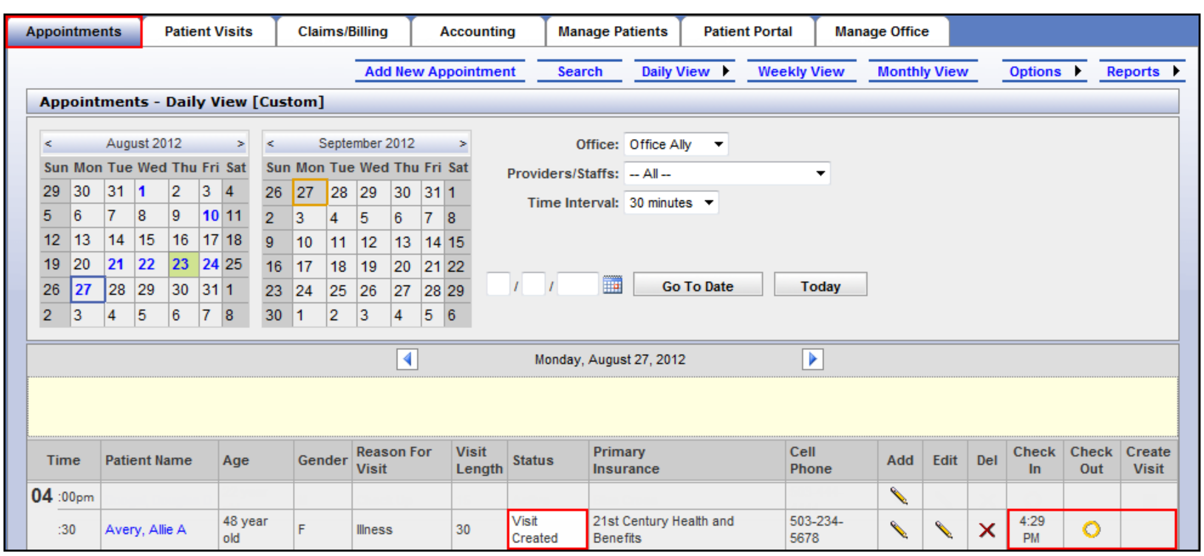
After completing the Visit, you will be brought to the **Patient Visits Tab**, and see the newly made visit on the list.

- **Visit ID**- Clicking on the number in this column will take you back to the Edit Visit screen.
- **Visit Type**- This will record how the visit was created.
  - **A**- Created from an appointment
  - **E**- Created from an encounter
  - **T**- Created from a template
  - **M**- Created manually from the **Add New Visit** link
- **Status**- This will always appear as "Open" on all new visits. You may change this by using the icon in the **Edit** column, and select a Visit Status from the drop down box under the **Visit Info** tab.
- **Charges**- Cost of the visit
- **Balances**- What is still owed for the visit cost.
  - Until patient and insurance payments have been applied, the Balance will remain the same, even if payments have been received.
- **Edit**- Directs you back to the Edit Visit screen
- **Del**- Deletes the visit
  - May only delete the visit if you have not processed any payments or adjustments to the charges.



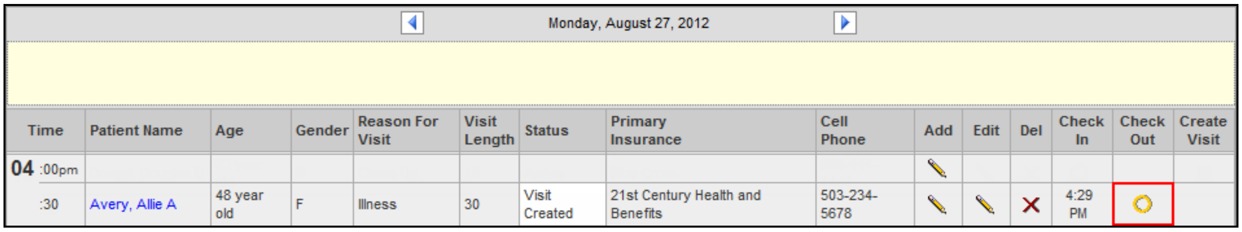

Click on the **Appointments Tab**, and the appointment chart will reflect check in and creating a visit.

- **Status**- Will change from Active to Visit Created.
- **Check In**- Shows the time stamp of check in.
- **Check Out**- Icon appears in previously blank space.
- **Create Visit**- The icon has disappeared, as the visit has already been created.



***Appointments Tab>Check Out***

When the patient is finished with their appointment, click the Check Out icon. A new screen will display.




The Check Out screen will give you **Print Options** of what information to include on the printed form. Some of the boxes may already be checked if they were set as defaults in the **Manage Office Tab**. You can adjust the options with the checkboxes. The **Check-Out Status** will need to be entered using the drop down box. This will populate the **Patient Check-Out Date/Time** and the **Patient Length of Visit** fields. If a payment was not taken at check in, you can record it here by clicking **Add Payment**, or receive an additional payment. When you have finished entering the Check Out information, you can **Print** the check out form, or **Update** to save the information without printing. The check out time will then appear in the **Check Out** column.