

# 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.

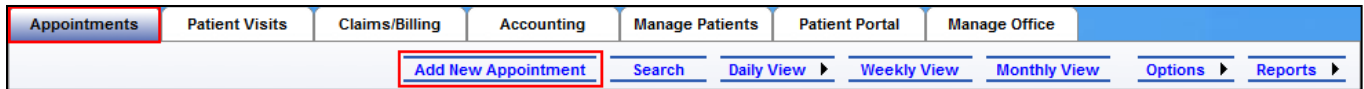
## APPOINTMENTS TAB

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.

Thursday, August 23, 2012																
Time	Length	Patient Name	DOB	Home / Cell Phone	Provider/ Staff	Reason for Visit	Status	Elig. Status	Elig. copy	Reminder Status	Add	Edit	Del	Check In	Check Out	Create Visit
08 :00	15 mins	Baker, Barry B	2/22/1952	503-222-2222 / 503-222-2223	John Smith	Exam	Active	Do Not Check								

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.

Thursday, August 23, 2012													
Time	Length	Patient Name	DOB	Home / Cell Phone	Provider/ Staff	Reason for Visit	Status	Elig. Status	Elig. copy	Reminder Status	Add	Edit	Del
08 :00	15 mins	Baker, Barry B	2/22/1952	503-222-2222 / 503-222-2223	John Smith	Exam	Active	Do Not Check					
:15													

### *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**.

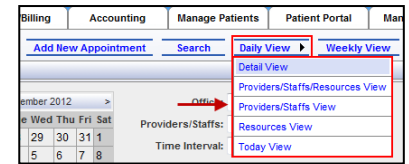
Friday, August 24, 2012									
Time	[Provider] David Dickson	[Provider] Fran Foster	[Provider] John Smith	[Nurse] Ashley Anderson	[Medical Assistant] Bob Baker	[Machine] CT Scan	[Room] Exam 1	[Room] Exam 2	
10 :00		X	10:00 am ✓Childs, Charlie				10:00 am ✓Childs, Charlie		
:15		X							
:30		X	10:30 am Doogal, Douglas						
:45		X							
11 :00		X							
:15		X							
:30		X							

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*

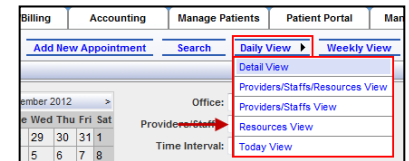
This is similar to the **Providers/Staff/Resources View**, but does not include the Machines or Rooms. This would be used to quickly see which staff or providers were available. The appointments will have the yellow icon available for more detailed information.



Thursday, August 23, 2012						
Time	[Provider] David Dickson	[Provider] Fran Foster	[Provider] John Smith	[Nurse] Ashley Anderson	[Medical Assistant] Bob Baker	Time
08 :00		✗	08:00 am ✓Baker, Barry			08 :00
:15		✗				:15
:30		✗	08:30 am Avery, Allie			:30
:45		✗				:45

### *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.



Thursday, August 23, 2012						
Time	[Machine] CT Scan	[Room] Exam 1	[Room] Exam 2	[Room] Exam 3	[Machine] MRI	[Machine] Ultra Sound
08 :00		08:00 am ✓Baker, Barry				
:15						
:30			08:30 am Avery, Allie			
:45						

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

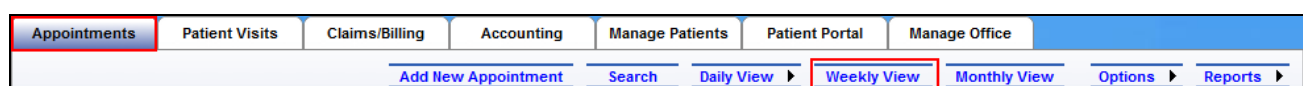
This selection includes the same information and set up as the **Detail View** for the current date. If you wanted to see in detail the appointments for a day in the future, you would use the **Detail View**. If you wanted to see the current day, use this option.



Thursday, August 23, 2012													
Time	Length	Patient Name	DOB	Home / Cell Phone	Provider/ Staff	Reason for Visit	Status	Elig. Status	Elig. copay	Reminder Status	Add	Edit	Del
08 :00	15 mins	Baker, Barry B	2/22/1952	503-222-2222 / 503-222-2223	John Smith	Exam	Active	Do Not Check					
:15													

### *Appointments Tab>Weekly View*

This option will display the schedule for seven days.







A new menu will appear, in which you can change multiple 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**.

August 2012							September 2012						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	29
2	3	4	5	6	7	8	30	1	2	3	4	5	6

Show No. of Calendar: 2 ▾

Show Office Daily Message? ☒

Default View Page: Daily Detail View ▾

Daily Detail View Page: Use System Page ▾

Update
Cancel

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.

Show No. of Calendar: 1 ▾

Show Office Daily Message? ☐

Default View Page: Daily Detail View ▾

Daily Detail View Page: Use Custom Page ▾ →

**Available Fields:**

- Address
- Age
- Appointment ID
- Auth. Number
- Cell Phone
- Check In?
- Date Created
- DOB
- Elig. Copay
- Elig. Status

Select >>

<< Unselect

**Selected Fields:**

- Visit Length
- Reason For Visit
- Primary Insurance
- Visit Copay
- Home Phone
- Provider Name
- No. of Visits Auth.
- Notes
- Scheduled By
- Status

Align Control Icons (Add/Edit/Del/Check-In): Right ▾

Update
Cancel

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.

**Available Fields:**

- No. of Visits Auth.
- Office
- Primary Insurance
- Provider Name
- Reason For Visit
- Sec. Insured Name
- Secondary Insurance
- Status
- Visit Copay
- Work Phone

Select >>

<< Unselect

**Selected Fields:**

- Patient Account No
- Elig. Copay
- Age
- Address
- Visit Length
- Cell Phone
- Gender
- Notes
- Patient ID
- Scheduled By

**Available Fields:**

- Appointment ID
- Auth. Number
- Check In?
- Date Created
- DOB
- Elig. Status
- First Name
- Home Phone
- Insured Name
- Last Name

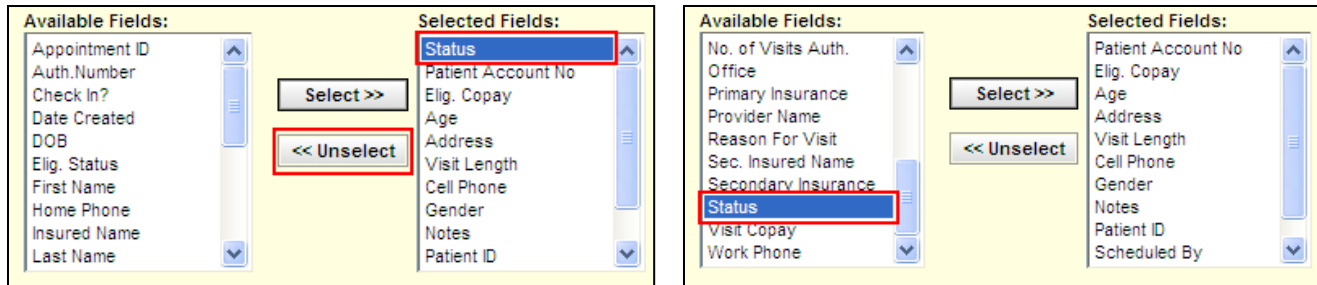
Select >>

<< Unselect

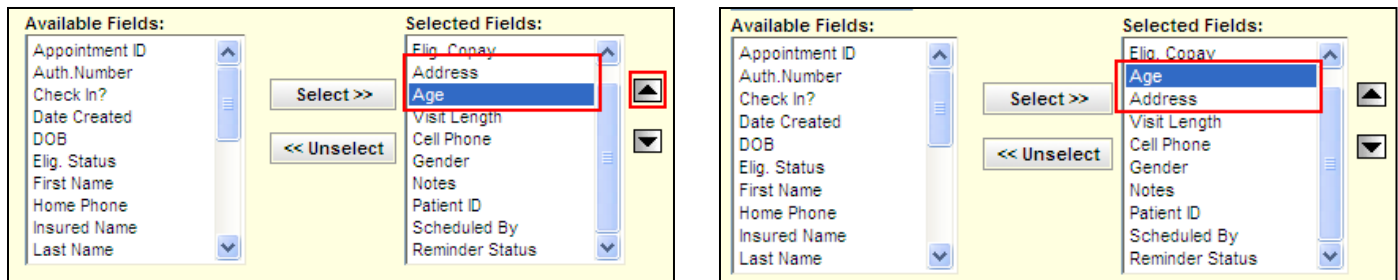
**Selected Fields:**

- Status
- Patient Account No
- Elig. Copay
- Age
- Address
- Visit Length
- Cell Phone
- Gender
- Notes
- Patient ID

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

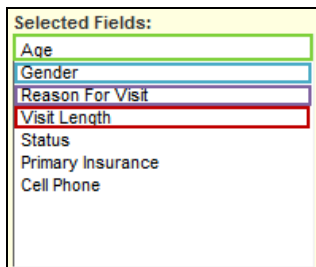
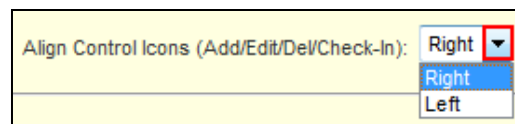


Figure 2



**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.

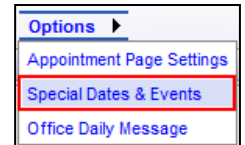
**Note:** If you have several selections, you may have to scroll horizontally across the appointment chart to see the additional fields.

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		


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.

Special Dates & Events - [Last 100 Entries]										
Display Filter: Office: -- All -- Event Type: -- All -- <div>Add Office Event Add Provider/Staff Event</div>										
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**.

Office: Office Ally  
 Providers/Staffs: [Provider] Fran Foster  
 From Date: 8/31/2012 Time: 08:00 am  
 To Date: 9/5/2012 Time: 05:00 pm  
 Description: Vacation  

Update Cancel

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

Special Dates & Events - [Last 100 Entries]										
Display Filter: Office: -- All -- Event Type: -- All -- <div>Add Office Event Add Provider/Staff Event</div>										
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.

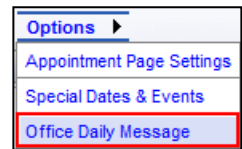
Monday, May 27, 2013	
-- CLOSED --	

From 5/26/2013 To 6/1/2013				
	Sun 5/26/2013	Mon 5/27/2013	Tue 5/28/2013	Wed 5/29/2013
08:00	×	×		
:15	×	×		

Friday, August 31, 2012						
Time	[Provider] David Dickson	[Provider] Fran Foster	[Provider] John Smith	[Nurse] Ashley Anderson	[Medical Assistant] Bob Baker	Time
08:00		×				08:00
:15		×				:15

## 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**.



Show No. of Calendar: 2  
 Show Office Daily Message? ☒  
 Default View Page: Daily Detail View  
 Daily Detail View Page: Use Custom Page

Thursday, August 23, 2012

Staff Meeting 10am

Time	Patient Name	Gender	Patient ID	Patient Account No	Elig. Copay	Address	Age	Visit Length	Cell Phone	Notes
08:00	Baker, Barry B	M	25482182			222 Main St, Springfield, OR 97222	60 year old	15	503-222-2223	

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**.

Office: Office Ally  
 Message Date: 8 / 23 / 2012 (mm/dd/yyyy)  
 Message: Staff Meeting 10am (512 chars max)  
☒ Add this message for all offices  
 Update Cancel

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

Office Daily Message - [Last 100 Entries]

Display Filter: Office: -- All --  
 Use this option to enter office daily short messages for inter-office communication. The message will be displayed at top of the Daily or Weekly View Appointment pages if user selects the option "Show Office Daily Message" in Appointment Page Settings.

Add Message

Message Date	Office Name	Messages	Last Modified By	Last Modified Date	Edit	Del
08/23/2012	Office Ally	Staff Meeting 10am	kmeisner000test	08/23/2012		

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 - Daily View [Custom]

Office: Office Ally  
 Providers/Staffs: -- All --  
 Time Interval: 15 minutes

Go To Date Today

Thursday, August 23, 2012

Staff Meeting 10am

## 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.

Date	Time	Length	Patient ID	Patient Name	DOB	Phone	Provider	Reason For Visit	Status
<b>Tuesday, 5/15/2012</b>									
8:00 AM	20 mins	25509489	Avery, Allie	04/26/1964	503-123-4567	John Smith	Illness	Active	
<b>Wednesday, 5/16/2012</b>									
8:00 AM	15 mins	25509489	Avery, Allie	04/26/1964	503-123-4567	John Smith	Illness	Active	
8:00 AM	15 mins	25509541	Edwards, Ellie	--	--	John Smith	Check Up	Active	
<b>Thursday, 5/17/2012</b>									
8:30 AM	15 mins	25509529	Childs, Charlie	--	--	John Smith	Illness	Active	
<b>Total:</b>		<b>4</b>							

### *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.

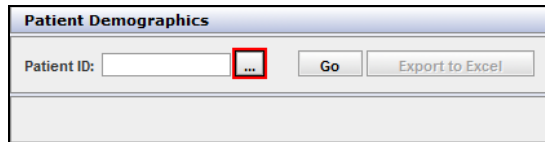
**Note:** The reports will look different depending on the PDF viewer you have installed on your computer.

### *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.

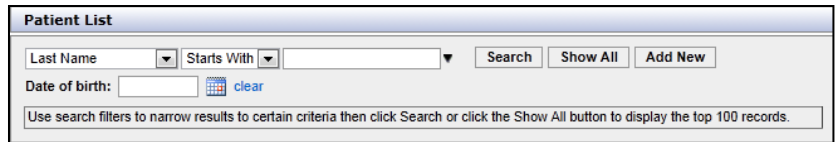


Select a patient with the Search button, . A pop-up screen will appear, allowing you to search for your patient. Enter search criteria, or click **Show All** to display the first 100 results. Click **Select** for the patient you want to run the report on.




**Patient Demographics**

Patient ID:  



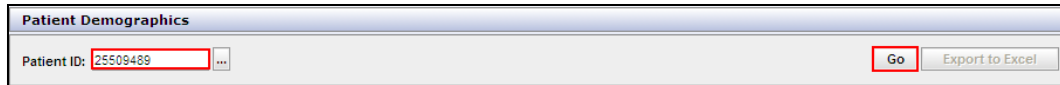
**Patient List**

Last Name  Starts With


Date of birth:  

Use search filters to narrow results to certain criteria then click Search or click the Show All button to display the top 100 records.

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



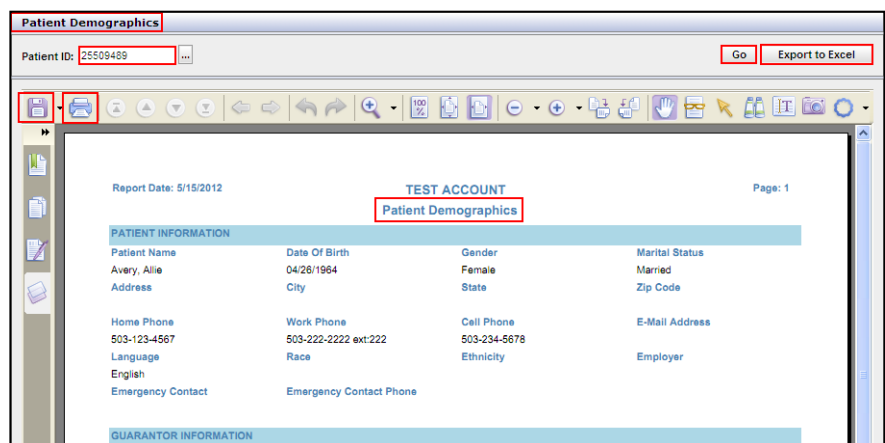
**Patient Demographics**

Patient ID: 25509489 

**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.



**Patient Demographics**

Patient ID: 25509489

Report Date: 5/15/2012 Page: 1

**TEST ACCOUNT**

**Patient Demographics**

PATIENT INFORMATION			
Patient Name	Date Of Birth	Gender	Marital Status
Avery, Alle	04/26/1964	Female	Married
Address	City	State	Zip Code
Home Phone	Work Phone	Cell Phone	E-Mail Address
503-123-4567	503-222-2222 ext:222	503-234-5678	
Language	Race	Ethnicity	Employer
English			
Emergency Contact	Emergency Contact Phone		

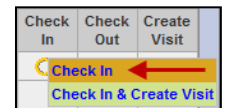
**GUARANTOR INFORMATION**


## 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.

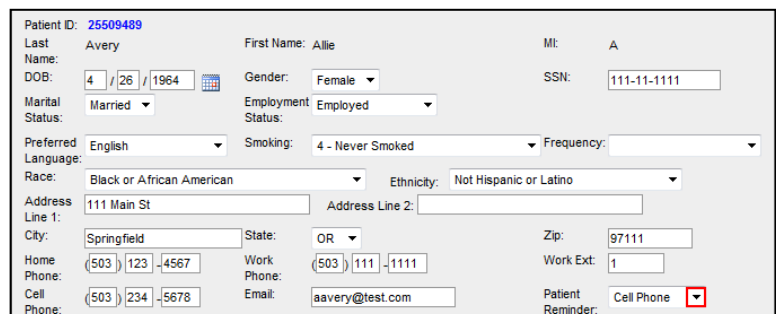
The **Check In** option will be a basic process, with only the necessary information. Patient information, Insurance information, payment, and check in time. Click the **Check In** option to begin.



Check In	Check Out	Create Visit
 <b>Check In</b>		
<b>Check In &amp; Create Visit</b>		

**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.



Patient ID: 25509489

Last Name: Avery First Name: Alle MI: A

DOB: 4 / 26 / 1964 Gender: Female SSN: 111-11-1111

Marital Status: Married Employment Status: Employed

Preferred Language: English Smoking: 4 - Never Smoked Frequency:

Race: Black or African American Ethnicity: Not Hispanic or Latino

Address Line 1: 111 Main St Address Line 2:

City: Springfield State: OR Zip: 97111

Home Phone: (503) 123 -4567 Work Phone: (503) 111 -1111 Work Ext: 1

Cell Phone: (503) 234 -5678 Email: aavery@test.com Patient Reminder: ☒ Cell Phone

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.

<b>Insurance/Eligibility</b>	
Date Checked On:	Elig. Activation: <input checked="" type="checkbox"/>
Eligibility Status: Do Not Check	
Health Plan Eligibility Benefit Co. ID: 0	Health Plan Eligibility Benefit Co. Name:
BatchEligibilityPayer	
Insurance Co. ID: 898608	Insurance Name: 21st Century Health and Benefits
Subscriber ID:	Group No: Plan Name:
Deductible:	Copay:

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.

Patient Responsibility Balance: \$0.00		Account Status: Active						
<b>Payments</b> (entered from this Check in page):								
Payment Date	Payer Type	Payer	Payment Method	Check/Auth No	Amount	Applied Amount	Delete	Receipt
08/23/2012	Patient	Allie Avery	Check	101	\$25.00	\$0.00		
Payment Method: Check				Amount: 25.00				
Check Number: 101				Description: Co-pay		<b>Add Payment</b>		

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.

Appointment With: Provider	Superbill: Office Superbill
John Smith	
Resource: Room	Exam 1
Check-In? <input checked="" type="checkbox"/>	Check in time: 4:05 PM
<b>Print Patient Demographics</b> <b>Print Superbill</b> <b>Update</b> <b>Cancel</b>	

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.

Report Date: 8/8/2012	TEST ACCOUNT	Page: 1	
Patient Demographics			
Patient Name	Date Of Birth	Gender	Marital Status
Avery, Allie A	04/26/1964	Female	Married

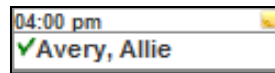
The **Print Superbill** button will print the selected Superbill, with the patient's information already included.

<b>Doctor's Office</b> 1234 Main ST Springfield, OR 97000		Phone: (503) 555-5555 Fax: (503) 333-3333																																															
<b>Patient Name:</b> Avery, Allie A <b>DOB:</b> 4/26/1964 <b>Primary Insurance:</b> 21st Century Health and Benefits		<b>Date of Service:</b> 8/23/2012 4:00pm <b>Subscriber ID:</b>																																															
<b>PROCEDURES OR SERVICES</b>																																																	
<table border="1"> <thead> <tr> <th></th> <th>Office Visit- New Patient</th> <th>Units</th> <th>FEE</th> </tr> </thead> <tbody> <tr> <td>99024</td> <td>Post Op Care</td> <td>0</td> <td>0.00</td> </tr> <tr> <td>99201</td> <td>Problem Focused</td> <td>0</td> <td>80.00</td> </tr> <tr> <td>99202</td> <td>Exp Problem Foc</td> <td>0</td> <td>120.00</td> </tr> <tr> <td>99203</td> <td>Detailed</td> <td>0</td> <td>150.00</td> </tr> <tr> <td>99204</td> <td>Comprehensive</td> <td>0</td> <td>170.00</td> </tr> </tbody> </table>		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	<table border="1"> <thead> <tr> <th></th> <th>Office Visit- New Patient</th> <th>Units</th> <th>FEE</th> </tr> </thead> <tbody> <tr> <td>99205</td> <td>Complex</td> <td>0</td> <td>180.00</td> </tr> <tr> <td colspan="2">OTHERS</td> <td>Units</td> <td>FEE</td> </tr> <tr> <td></td> <td></td> <td></td> <td>0</td> </tr> <tr> <td></td> <td></td> <td></td> <td>0</td> </tr> <tr> <td></td> <td></td> <td></td> <td>0</td> </tr> </tbody> </table>		Office Visit- New Patient	Units	FEE	99205	Complex	0	180.00	OTHERS		Units	FEE				0				0				0
	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																																														
<b>DIAGNOSIS OR SYMPTOMS</b>																																																	
<table border="1"> <thead> <tr> <th>ICD-9</th> <th>Exams</th> <th>HCC</th> </tr> </thead> <tbody> <tr> <td>V6759</td> <td>FOLLOW-UP EXAMINATION AFTER OTHER TREATMENT, UNSPE</td> <td>N</td> </tr> <tr> <th>ICD-9</th> <th>Labs</th> <th>HCC</th> </tr> <tr> <td>78060</td> <td>FEVER, UNSPECIFIED</td> <td>N</td> </tr> </tbody> </table>	ICD-9	Exams	HCC	V6759	FOLLOW-UP EXAMINATION AFTER OTHER TREATMENT, UNSPE	N	ICD-9	Labs	HCC	78060	FEVER, UNSPECIFIED	N	<table border="1"> <thead> <tr> <th>ICD-9</th> <th>Labs</th> <th>HCC</th> </tr> </thead> <tbody> <tr> <td>0340</td> <td>STREPTOCOCCAL SORE THROAT</td> <td>N</td> </tr> </tbody> </table>	ICD-9	Labs	HCC	0340	STREPTOCOCCAL SORE THROAT	N	<table border="1"> <tr> <td>TOTAL FEE:</td> <td></td> </tr> <tr> <td>PAID:</td> <td></td> </tr> <tr> <td>BALANCE DUE:</td> <td></td> </tr> </table>		TOTAL FEE:		PAID:		BALANCE DUE:																							
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:																																																	
<b>Provider Name &amp; Signature:</b> John Smith- _____																																																	



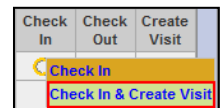
Click **Update** when finished to save the check in information, or **Cancel** to close without saving. The patient's name/appointment entry will now appear on the calendar with the time displayed in the **Check In** column for the **Daily** and **Detail Views**, or with a green check mark next to their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

	ICD-9	Description
Select	4878	INFLUENZA WITH OTH MANIFESTATIONS
Select	7862	COUGH

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).

Superbill Template: Superbill 1  Print Date Options: Use Date of Service

Notes: This template here is to be used as a worksheet for provider. You can print a hard copy then fill-in data on the paper or you may input data directly into this worksheet. Please note that data entered in this Superbill worksheet will not be saved; however, as you are changing information, data will be updated to the above line items for your convenience.

Doctor's Office  
PROCEDURES OR SERVICES

Office Visit- New Patient	Units	FEE	Office Visit- New Patient	Units	FEE
99205 Complex	<input type="checkbox"/>	\$ 180.00	99201 Problem Focused	<input type="checkbox"/>	\$ 80.00
99204 Comprehensive	<input type="checkbox"/>	\$ 170.00			
99203 Detailed	<input type="checkbox"/>	\$ 150.00			
99202 Exp Problem Foc	<input type="checkbox"/>	\$ 120.00			
99204 Post Op Care	<input type="checkbox"/>	\$ 0.00			

OTHERS

Units	FEE
<input type="checkbox"/>	\$ 0
<input type="checkbox"/>	\$ 0
<input type="checkbox"/>	\$ 0

DIAGNOSIS OR SYMPTOMS

ICD-9 Exams	ICD-9 Labs	ICD-9	Labs
V6759 FOLLOW-UP EXAMINATION AFTER OTHER TREATMENT, UNSPE	<input type="checkbox"/>	0340	STREPTOCOCCAL SORE THROAT
ICD-9 Labs			
78060 FEVER, UNSPECIFIED	<input type="checkbox"/>		

TOTAL FEE:   
PAID:   
BALANCE DUE:

Provider Name & Signature: John Smith -

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.

**Edit Visit - [Visit ID: 45817015]**

Visit Info **Billing Info** Billing Options

Diagnosis Codes (lookup history)

1. 7862 ☐ 2. ☐ 3. ☐ 4. ☐ 5. ☐ 6. ☐ 7. ☐ 8. ☐

Date of Service From	To	POS	CPT	Modifier A B C D	Diag. Pointer	Line Charges	Days or Units	Ins. Paymt	Patient Paymt	Adj.	Balance	Del
8/23/2012	8/23/2012	11	99201		1	100.00	1				100.00	X
												X
												X

**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.

**Edit Visit - [Visit ID: 45817015]**

Visit Info Billing Info **Billing Options**

**Other Providers / Contacts**

Referring Physician: (First MI & Last Name) 473080  Jones Phys. ID  NPI 1234567890 (HCFA form, box 17)

Supervising Physician: (First MI & Last Name)  Phys. ID  NPI

Ordering Physician: (First MI & Last Name)  Phys. ID  NPI

**Facility:** ID 151318  (HCFA form, box 32)

Facility Name Office Ally

Address 1234 Main St

City Springfield State OR Zip 97000

Facility ID  NPI 0987654321

**Billing Provider:** ID 140852  (HCFA form, box 33)

Billing Prov. Name Zach Zimmerman

Address 1234 Main St

City Springfield State OR Zip 97000

Phone (360) 360-3600

Billing Prov. Group  NPI 1234567890 (HCFA form, box 25)

Tax ID 99-9999999 SSN ☐ EIN ☒ (HCFA form, box 25)

**Conditions** Patient's Condition Related To: No  (HCFA form, box 10a)

Employment (current or previous)

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.

Monday, August 27, 2012												
Time	Patient Name	Age	Gender	Reason For Visit	Visit Length	Status	Primary Insurance	Cell Phone	Add	Edit	Del	Create Visit
04 :00pm												
:30	Avery, Allie A	48 year old	F	Illness	30	Visit Created	21st Century Health and Benefits	503-234-5678				

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.

**Check Out**  
 Patient ID: 25509489  
 Last Name: Avery First Name: Allie Mt: A  
 Print Options:  
☒ Patient Demographics  
☐ Receipt  
 Check-Out Status: Appt. Completed **Edit**  
 Patient Check-In Date: 8/23/2012  
 Patient Check-In Time: 4:29 PM  
 Patient Check-Out Date: 8/23/2012  
 Patient Check-Out Time: 4:57 PM  
 Patient Length of Visit: 28 Minutes  
 Add Payment **Print** **Update** **Cancel**  
 Patient Responsibility Balance: \$0.00 Account Status: Active  
 Payments:  

Payment Date	Payer Type	Payer	Payment Method	Check/Auth No	Amount	Applied Amount	Delete
--------------	------------	-------	----------------	---------------	--------	----------------	--------

Monday, August 27, 2012												
Time	Patient Name	Age	Gender	Reason For Visit	Visit Length	Status	Primary Insurance	Cell Phone	Add	Edit	Del	Create Visit
04 :00pm												
:30	Avery, Allie A	48 year old	F	Illness	30	Visit Created	21st Century Health and Benefits	503-234-5678				