Office Practicum

Front Desk Quick Reference Guide

Scheduling Appointments

Make an Est./New Patient Appointment

Register the new patient first before proceeding.

1. On the OP Toolbar click on the Sched button.

2. Select an appointment slot, then double-click on the appointment.

3. Search for a patient using the **Patient Lookup**.

4. Select the **Appointment Reason** and the **Appointment Type**.

5. Click on the Save button to exit.

Move an Appointment

1. On the OP Toolbar click on the Sched button.

2. Select the appointment to be moved :35 :40 TEST, :45.

3. To begin moving appointment, click on the button located under the calendar.

4. Notice the warning Moving Appointment! .

5. Select a time slot to move the appointment to.

6. To finish moving the appointment, click the button.

Search for an Appointment

1. On the OP Toolbar, click on the Sched button.

2. Click on the **Search for Appointment** button located under the calendar.

3. Search for a patient using **Patient Lookup** .

4. The **Search for Appointment** screen will now display all of the patient's appointments.

Delete an Appointment

1. On the OP Toolbar click on the Sched button.

2. Select the appointment to delete :35 :40 TEST, :45.

3. Click button located on the right side under the calendar.

4. Click Yes to confirm this appointment is being deleted.

5. In the **Audit Trail for: Schedule** window, type the reason why this appointment is being deleted.

6. Click on the OK button to save.

Front Desk Quick Reference Guide

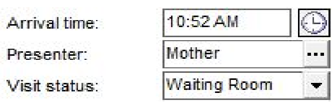
Check In

Check In Procedure

1. On the OP Toolbar click on the Sched button.

2. Select an appointment, then double-click.

3. In the Add/Edit Appointment screen populate:



4. To collect the copay click PCP Visit button. Next, click on the button.

5. In the Patient Credit Account window select the Pay method and click on the Save / Post button.

6. Click on the Save button to exit the Add/Edit Appointment window.

Print a Receipt

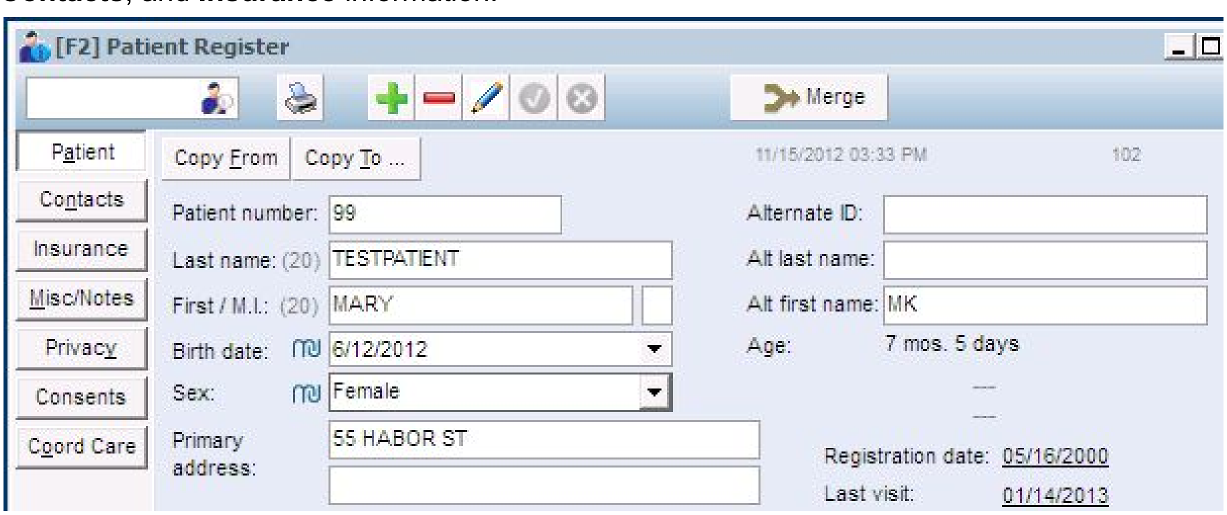
1. On the OP Toolbar click on the Sched button.

2. Select an appointment, then right click .

3. From the list of options choose **Print Receipt**.

4. Click the button in the preview screen to print.

Tip: The Check in Procedure may involve updating the patient's Register Rgstr record. This includes **Patient**, **Contacts**, and **Insurance** information.



Check Out

Check Out Procedure

1. Click on the Tracking tab.

2. Click the drop down box to change the **Visit Status** to Checked Out (Visit Status: Checked Out).

3. If needed, check Show billing reconciliation at the top of the **Tracking** window to begin posting superbill charges.

Collect a Payment

1. On the OP Toolbar click on Sched button.

2. Select the appointment, then double-click.

3. In the **Add/Edit Appointment** screen enter the payment received amount (Payment rcvd: 100.00).

4. Click on the button to collect payment.

5. In the **Patient Credit Account** window select the **Pay method** and click on the Save / Post button.

6. Click on the Save button to exit.

Mark an Appointment Checked out/ Cancelled/No show

1. On the OP Toolbar click on the Sched button.

2. Select an appointment then right click (:35 :40 :45 TEST,).

3. Toggle over **Visit Status** and select **Check Out**, **Cancelled**, or **No Show**.

Print Missed School/Work Note

1. On the OP Toolbar click on the Sched button.

2. Select an appointment then right click (:35 :40 :45 TEST,).

3. From the list of options choose either note to print Print Patient Missed School / Print Patient Missed Work.

4. Click the Printer button in the preview screen to print.

End of Day (1 of 2)

Print the Calendar Schedule

1. On the OP Toolbar click on the  button.

2. Select an appointment then right click 
.

3. From the list of options choose **Print OP Superbill**.

4. Click on the Printer  button.

Print the Tracking Schedule

1. On the OP Toolbar click on Tools.

2. Select **OP Reports**, click **Front Desk Reports**, and double-click on **OP Superbill**.

3. Select criteria in the Search **OP_Superbill** window.

4. Click  then click the Printer  button in the preview screen to print.

Print the Calendar Schedule

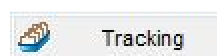
1. On the OP Toolbar click on the  button.

2. In the upper right hand side click the  button.

3. Select **Appointment Interval**, select **Start Column**, **End Column** and click **Print**.

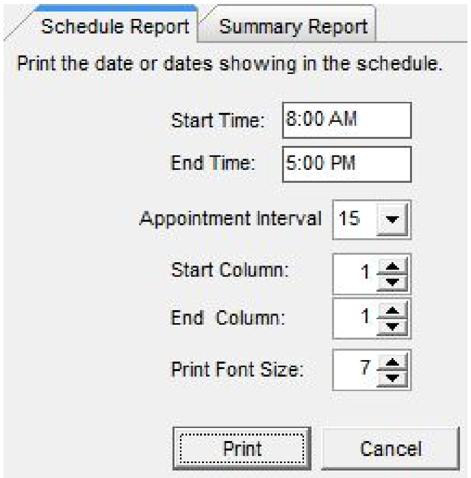
Print the Tracking Schedule

1. On the OP Toolbar click on the  button.

2. Click on the  tab.

3. In the left corner click the Printer  button.

4. Click the Printer  button in the preview screen to print the schedule.



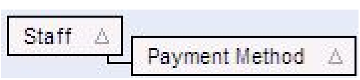
End of Day (2 of 2)

Reconcile Payments

1. On the OP Toolbar click on the  button.

2. Click on the  tab.

3. Filter by dragging up staff and payment method.



4. Reconcile all money collected.

5. To print the report click on the  button located at the top of the Electronic Billing Center window.

Messaging

Send a New Message	Save a Comment in the Chart
1. On the OP Toolbar click on the Send button.	**1.** On the OP Toolbar click on the Send button.
2. Click on the Clear button.	**2.** Click on the Clear button.
3. Search for the patient using the **Patient Lookup**.	**3.** Search for the patient using the **Patient Lookup**.
4. Type in the Subject.	**4.** Click the checkbox No one to save it as a comment in the patient's chart.
5. In the **Message** section, enter the body of the message.	**5.** Type in the Subject.
6. Click to select recipients, or click on the drop down arrow in the To field to select a recipient.	**6.** In the **Message** section, enter the body of the message.
7. Click on the Send button.	**7.** Click on the Save button.