Front Desk QRG

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Schedule Appointments

1. Access the Calendar window: **Clinical, Practice Management, or Billing tab > Schedule button**.
2. Double-click an appointment slot to open the **Add/Edit Appointment** window.
3. Click the **Patient Finder**  to search for and select a patient.
   Note: You may search for a patient using the text field and a combination of the patient's last name and first name. Additional methods of searching can be viewed by hovering over the **Patient Finder** button.
   - If the patient is new to the Practice, click **Patient Chart** and navigate to **Basic Information** in the **Demographics** group. More information on how to add a patient can be found in the reference guide titled, *Register a Patient QRG*.
4. Complete the appointment fields:
   a. **Appt reason:** Begin typing or click the drop-down and select the reason from the list.
   Note: The selections that are displayed in the **Appt reason** list are based upon your visibility level and the template visibility level. Well Visit templates are available to view by all users.
   b. **Appt type:** Confirm what is auto-populated based on the appt reason selected, and change if needed using the drop-down.
   c. *(Optional)* **Curbside**: This tool allows parents to notify the practice from their cars (remotely) that they have arrived for a scheduled appointment and pay their copay (via Instamed Merchant Services) without the need to involve staff.
      i. Click the **Curbside** checkbox. The Curbside Phone Number window is displayed.
      ii. Enter a cell phone number in the **Mobile Phone Number** field, or click the drop-down and select a cell phone number.
      iii. Click the **Save** button**.**

5. Click the **Save** button.

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Schedule Actions

Move an Appointment

1. Click the appointment to select it.
2. Move the appointment using one of the following methods.

   Move button:

   a. Click the **Move** button located below the calendar.

   b. Navigate to the new appointment slot, and click the **Move** button again.

   Menu:

   a. Right-click and select **Move appointment.**

   b. Navigate to the new appointment slot, right-click and select **End moving appointment.**

Delete an Appointment

1. Click the appointment to select it.
2. Delete the appointment using one of the following methods.

   Delete button:

   a. Click the **Delete** button located beneath the Calendar.

   b. Click **OK** to delete the appointment.

   c. **Enter a reason** in the Audit Trail.

   d. Click **OK.**

   Menu:

   a. Right-click and select **Delete appointment.**

   b. Click **OK** to delete the appointment.

   c. **Enter a reason** in the Audit Trail.

   d. Click **OK**.

Cancel an Appointment

1. Click the appointment to select it.
2. Right-click the appointment.
3. Select the Visit status of **Cancelled**.
4. Click to select the cancelled appointment.

5. Click the red box located at the top of the appointment.
6. Hold the mouse button down and drag the appointment down to the bottom of the column. The time slot will become available for scheduling.

Copy an Appointment

1. Click the appointment to select it.
2. Copy the appointment using one of the following methods.

   Copy button*:*

   a. Click the **Copy** button located below the calendar.
   b. Complete the information on the **Copy Appointment** window.
   c. Click **Copy** to copy the appointment.
   d. If the **Confirm each addition** checkbox was selected, click **Yes** in the **Copy Appointment Confirmation**.
   e. Click **Cancel** to close the window.

   Menu*:*

   a. Right-click and select **Copy appointment.**
   b. Using the Calendar, navigate to the date to copy the appointment to.
   c. Select an appointment slot and right-click.
   d. Select **Paste appointment.**
   e. Click **Yes** if copying the appointment to other dates or click **No** to end the copy.

Search for Existing Appointments

1. Click the **Search** button located below the calendar.
2. Click the **Patient Finder** button to search for a patient.
3. Double-click to select a patient.

   Note: All past and future appointments display in the Appointment grid.

Find Available Appointment Times

1. Click the **Find Avail** button located below the calendar.
2. Click the **Patient Finder** button to search for a patient.
3. Double-click to select a patient.
4. Complete the search parameters.
5. Click **Find Appointments**.

6. Double-click on the time or click **Go To Schedule**. The calendar jumps to the date and time of the selected appointment. Proceed with scheduling the appointment. Alternatively, click the **Add Appt** button to open the Add/Edit Appointment window for the selected date/time and schedule the appointment.

Reschedule/Move Up Appointment List

1. From the calendar, select an appointment.
2. Open the Add/Edit Appointment window by double-clicking or selecting the **Edit** button.
3. Click in the **Move-up option** field and type the appointment request.
4. Click the **Find Move-Up** button located beneath the Calendar to open the **Patient Rescheduling List**.
   Note: Only patients that have the Move-up Option completed in the Add/Edit Appointment window are displayed on the Patient Rescheduling List. Requests to move an appointment do not appear on the report for the current appointment and appointments for previous days.
5. Highlight the patient appointment to move and click **OK**. The calendar is placed at the selected patient appointment.
6. Highlight the appointment and click **Move.**
7. Move the appointment to the date and/or time requested.

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Check-In

Check In a Patient

1. Access the Calendar window: **Clinical, Practice Management, or Billing tab > Schedule button**.
2. Double-click an appointment to open the **Add/Edit Appointment** window.
   Note: Prior to completing the check-in, it is a Best Practice to confirm the patient demographic, contact and insurance information is accurate.
3. Complete the check-in fields:
   a. **Presenter**: Click the drop-down and select from the list.
   b. **Visit Status**: Click the drop-down and select from the list.
      Note: An arrival time populates when the Visit Status is selected.
4. *(Optional)*: Collect a copay.
   a. Click the **PCP Visit** button.
      Note: The PCP Visit button is used to collect a copay typically assigned by the patient insurance plan for non-preventive visits.

b. Click the **Payment** button  to open the **Patient's Credit Account** window.

c. Click the **Pay method** drop-down, select from the list and complete any additional fields.

d. Click **Save / Post.**

Note: If a payment was collected, the patient's appointment will show a **CoPaid** stamp.

5. *(Optional)*: Click the **Validate** button to validate the patient's insurance.
6. Click **Save**.

Validate Insurance for Patients on the Schedule

1. Access the Tracking window: **Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button**.
2. Validate insurance.
   a. For an individual patient on the schedule:
      i. Select the patient line.
      ii. Click the **Verify Insurance** button . Validation will process and return a result in the **Ins. Valid** column based on the color key.
   b. For all patients on the schedule:
      i. Click the **Validate** button at the top of the Tracking screen.
      ii. In the Insurance Validation window, select your criteria, and click **Begin**. Validation will process and return a result in the **Ins. Valid** column based on the color key.

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Check-Out

Check Out a Patient

1. Access the Tracking window: **Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button**
2. Select an appointment by clicking the appointment.
3. Right-click and select **Visit Status** > **Checked Out**.

Collect a Payment at the Time of Check Out

1. Access the Tracking window: **Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button**.
2. Click the appointment to select it.

3. Right-click and select **Add/Edit Appointmen**t from the drop-down.
4. In the Add/Edit Appointment window, click the **Payment** button to open the **Patient's Credit Account** window.
5. Click the **Pay method** drop-down, select from the list, and complete any additional fields.
6. Click **Save / Post**.

Print a Receipt

1. Access the Tracking window**: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button**.
2. Click the appointment to select it.
3. Right-click on the appointment, and select **Print Receipt**.
4. The Print dialog box is displayed. Confirm the printer and click **OK** to print.

Print from Front Desk Reports

1. Access the Tracking window: **Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button**
2. Click the appointment to select it.
3. Right-click on the appointment, and select **Print Other Reports**.
4. Select the appropriate report from the list (Print Future Appointments, Print Next Appointment Letter, Print Patient Missed School, Print Patient Missed Work).
5. The Print dialog box is displayed. Confirm the printer and click **OK** to print.

Print a Standard or Custom End User Report

1. Access the **Patient Medical Reports Manager** window: **Clinical tab > School/Camp Reports button.**
2. Click the **Patient Finder** to search for and select a patient.
3. Click the **Standard Reports** tab or **End User Reports** tab, depending on the form you want to print.
4. Select the checkbox of the form to print.
5. Click the **Print** button and select a printer.
6. The **Medical Record Disclosure Tracking** window is displayed. Complete the information and click **OK**.

Send a Standard or Custom End User Report to the Patient Portal

1. Access the **Patient Medical Reports Manager** window: **Clinical tab > School/Camp Reports button.**
2. Click the **Patient Finder** to search and select a patient.

3. Click the **Standard Reports** tab or **End User Reports** tab, depending on the form you want to print.
4. Select the checkbox of the form you wish to print.
5. Select the **Share to portal** checkbox.
6. Click the drop-down and select from the calendar or enter an expiration date in the **Portal Exp Date** field.
   Note: The Portal Exp Date field populates with the Default Document Expiration Date set in the Portal tab of System Preferences.
7. Click the **Print** button to send the report to the portal.

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End of Day

Reconcile Monies Received

1. Access the Receipts tab in the Billing Center: **Billing tab > Billing Center button > Receipts tab**.
2. *(Optional)*: Group and/or filter the data to display payments.
3. Select the **expand grid** checkbox at the bottom of the window to see payment details.
4. Reconcile the totals, by method of payment, against your physical monies received for the day.
5. *(Optional)*: Click the **Print Grid** button to print as displayed.

Confirm Appointment Statuses

1. Confirm all appointments are marked as either Checked-out, No Show, or Cancelled.
   From the Calendar:
   a. Access the Calendar window: **Clinical, Practice Management, or Billing tab > Calendar radio button.**
      - Click the appointment to select it.
        i. Right-click and select **Visit Status** > **Checked-Out**, **No Show**, or **Cancelled**.
           Note: No Show adds a Miscellaneous Note to the patient's chart, "@ No Show- Day, MM/DD/YYYY" and includes the patient on the No Show Appointments report.
      - Double-click the appointment to open the Add/Edit Appointment window.
        i. Select **Checked-Out** from the Visit status drop-down or **Cancelled**, **No Show**, **or No Show*** from the Billing Status drop-down.
           Note: The No Show* option does not create a Miscellaneous Note on the patient's chart and does not include the patient in the No Show report.

   From Tracking:
   b. Access the Tracking window: **Clinical, Practice Management, or Billing tab > Tracking radio button**.

c. Select **Checked-Out** from the Visit Status drop-down, or **Cancelled**, **No Show** or **No Show*** from the Billing Status drop-down.

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