Office Practicum

Tracking Schedule

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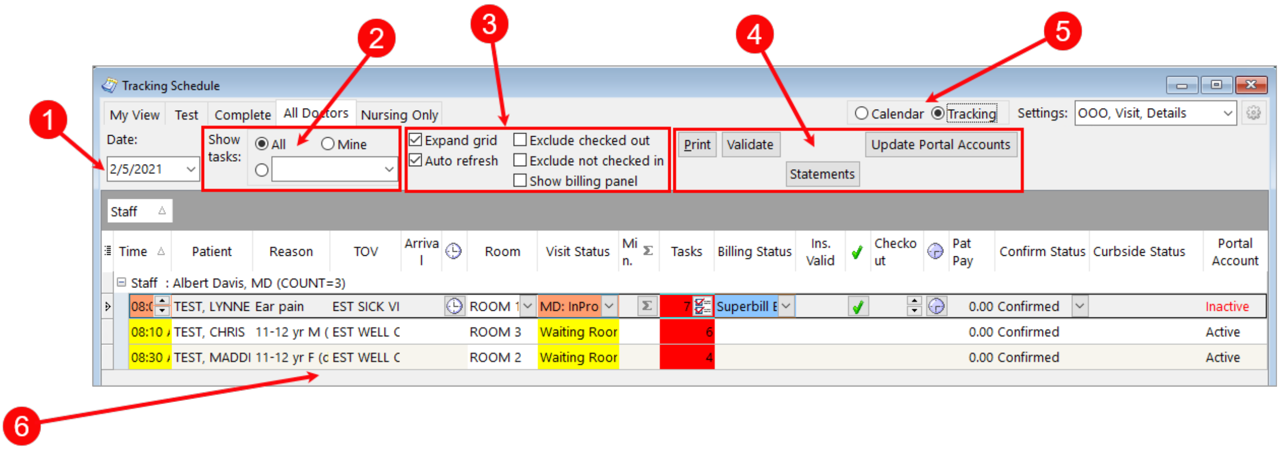
Version 20.11

*This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*

About Tracking Schedule

Path: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button

Tracking is used for different workflows throughout a Practice. It is typically used by the Clinical and Provider staff to initiate a Visit or to view the progress of a patient's appointment. Billing staff also manages most daily charge posting from the Tracking Schedule window. The **Show Billing Panel** checkbox can be selected or deselected to show or hide charge/billing information. Each user can determine which columns are displayed in their Tracking view.



Tracking Schedule Map

Number	Section	Description
1	Date	The Date field selects the date for appointments to be displayed in Tracking.
2	Show Tasks	The Show Tasks radio buttons determine the Tasks and count and for each patient.
3	Other Window Options	• **Expand Grid**: expands the grid by the grouping set in the gray bar located above the grid • **Auto refresh**: refreshes the window as changes are made • **Exclude checked out**: removes patients who have been Checked Out from the grid • **Exclude not checked in**: removes patients who have not yet checked in for their appointment. In combination with the above option of Exclude checked out, the practice can see a complete list of the patients currently in the office. • **Show billing panel**: displays the Billing Panel where routine charge posting is typically completed.
		• **Print**: prints the displayed tracking grid

4	Action buttons	• **Validate**: validates the insurance for all the appointments in the tracking grid • **Statements**: prints family statements for all the patients on the schedule • **Update Portal Accounts**: polls the InteliChart Patient Portal and updates the Portal Account column with the most up-to-date portal status for each patient. If a patient on the schedule is not found in the portal, an error including the patient number is displayed. Once you click **OK** in the error, the update resumes. • **Confirm** and **Send Message**: (not displayed in the image above; only available when using PMX)
5	Calendar and Tracking radio button	These radio buttons are used to toggle between the Calendar view and the Tracking view of the Schedule.
6	Tracking Grid	The Tracking grid displays all the patients that are on the schedule for the selected date. The grid displays appointment information in columns. Users may select which columns they want to show or hide. For steps on how to do this in OP, click **here**. Some of the columns most commonly shown include: Time, Patient, Appointment Reason, Arrival Time, Room, Visit Status, Tasks, and Billing Status, but the importance of the shown columns will depend upon the user. Additionally, other columns such as Curbside and Portal Account can be displayed as they are relevant to features the practice uses. The view of a user's Tracking tab can be saved as a preference by clicking the **Save Active Form** button located in the Personalize tab.

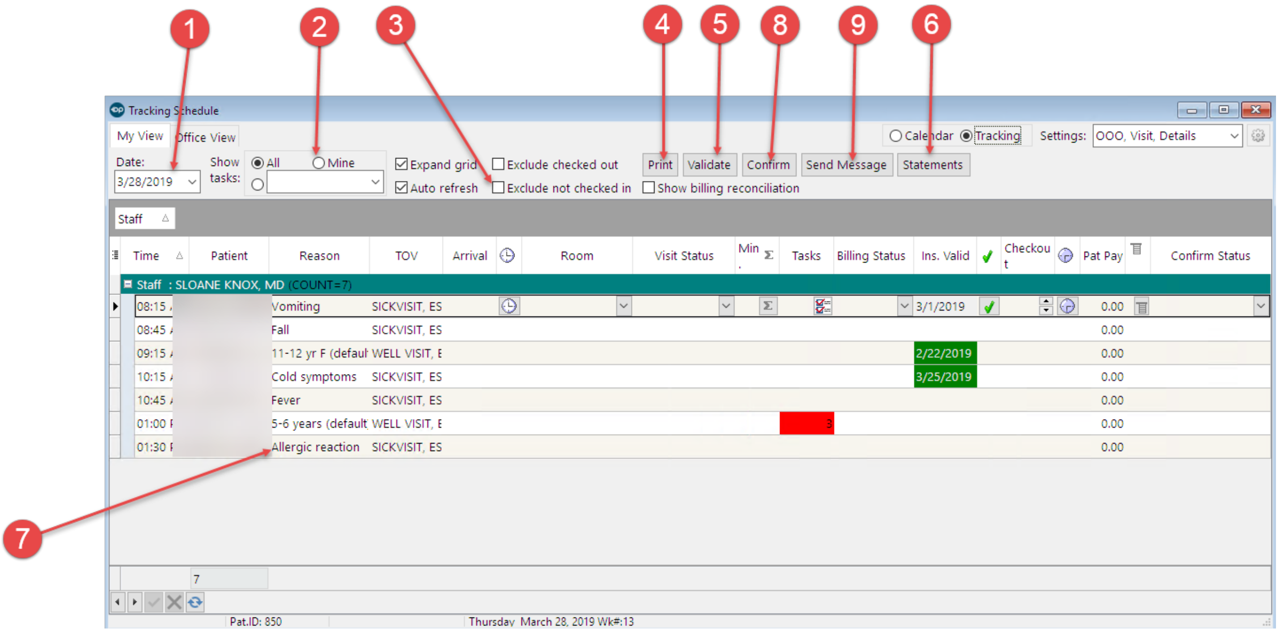
Version 14.19

About Tracking Schedule

Path: Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button

Tracking is typically used by the Clinical and Provider staff to view a patient's progress in the office. A patient's progress is tracked in stages. It is important to know exactly where a patient is at all times during a visit. Patient Tracking Stages will allow everyone to see what stage the patient is on during the visit. Each entry in the Patient Tracking Stages list has an associated virtual stage. If populated, the system will automatically advance the tracking stage as nurses and doctors open the encounter note.

> **Note**: If your practice has multiple locations, all rooms must be associated with a respective location. You are not able to reuse the room numbers.



Tracking Schedule Map

Number	Section	Description
1	Date	The Date field selects the date for appointments to be tracked.
2	Show Tasks	The Show Tasks radio buttons determine what patients are displayed in the tracking grid based upon the selected department.
3	Show Billing Reconciliation	Selecting the Show Billing Reconciliation checkbox opens the Billing Reconciliation window where payments can be applied, payers can be changed, insurance can be updated, and charges can be posted/displayed.
4	Print button	The Print button prints the displayed tracking grid.
5	Validate button	The Validate button validates the insurance for all the appointments in the tracking grid.
6	Statements button	The Statements button prints family statements for all the patients on the schedule.
7	Tracking grid	The tracking grid displays all the patients that are on the schedule for the selected date. The grid displays appointment information in columns. Users may select which columns they want to show or hide. For information on how to do this in OP, click here. Some of the columns most commonly shown include Time, Patient (whole name including alternate first name as set in the Register), Appointment Reason, Arrival Time, Room, Visit Status, Tasks, and Billing Status but the importance of the shown columns will depend upon the user. The view of a user's Tracking tab can be saved as a preference by clicking the Pref button on the Smart Toolbar.
8	Confirm button	The Confirm button opens the Patient Message eXchange in order to send messages to all unconfirmed appointments. This button is not visible when OP Notify is enabled.
9	Send Message button	The Statements button prints family statements for all the patients on the schedule.