

# Patient Tracking Stages

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Version 14.19

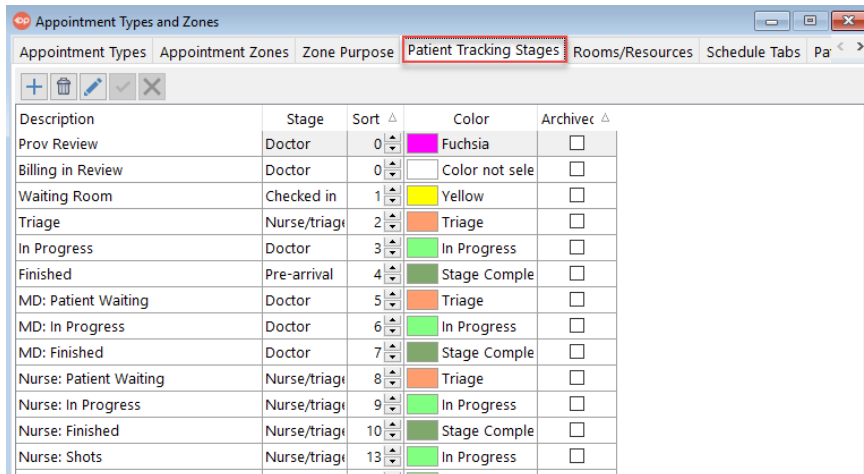
**Path: Practice Management tab > Appointments button**

## Overview



Patient Tracking Stages allow all staff to see the exact stage of a patient's visit during their time in the office.

## Adding Patient Tracking Stages


1. Navigate to Appointment Types and Zones window using the path above.
2. Click the **Patient Tracking Stages** tab.



Description	Stage	Sort	Color	Archived
Prov Review	Doctor	0	Fuchsia	<input type="checkbox"/>
Billing in Review	Doctor	0	Color not sele	<input type="checkbox"/>
Waiting Room	Checked in	1	Yellow	<input type="checkbox"/>
Triage	Nurse/triagi	2	Triage	<input type="checkbox"/>
In Progress	Doctor	3	In Progress	<input type="checkbox"/>
Finished	Pre-arrival	4	Stage Comple	<input type="checkbox"/>
MD: Patient Waiting	Doctor	5	Triage	<input type="checkbox"/>
MD: In Progress	Doctor	6	In Progress	<input type="checkbox"/>
MD: Finished	Doctor	7	Stage Comple	<input type="checkbox"/>
Nurse: Patient Waiting	Nurse/triagi	8	Triage	<input type="checkbox"/>
Nurse: In Progress	Nurse/triagi	9	In Progress	<input type="checkbox"/>
Nurse: Finished	Nurse/triagi	10	Stage Comple	<input type="checkbox"/>
Nurse: Shots	Nurse/triagi	13	In Progress	<input type="checkbox"/>

3. Click the **Add** button .
4. Enter the following information:
  - **Description:** the name of the Patient Tracking Stage. This is what is displayed on the Patient Tracking screen in the Visit Status column.
  - **Stage:** identifies the visit status stage.
  - **Sort:** the numeric order in which the Patient Tracking Stages are displayed in the drop-down menu.
  - **Color:** the color of the appointment when it is in this tracking stage. Do not edit Checked Out. The following stages do not allow you to change the tracking color:
    - Waiting Room
    - Triage
    - In Progress
    - Finished
    - Scheduled
    - Curbside
    - Note
    - Checked Out
  - **Archived:** select the Archived checkbox to indicate that the archived status is no longer in use and will not be displayed in the drop-down menu.
5. Click the **Save** button .
6. Once all changes are made and saved, close the window.

## Editing Patient Tracking Stages

1. Click the **Patient Tracking Stages** tab.
2. Click to select the item to modify.
3. Click the **Edit** button .
4. Edit any field (Description, Stage, Sort, Color, Archived).



**Note:** If your practice has enabled the System Preference to automatically reset visit stage when encounter notes are opened, the setup for Patient Tracking Stages is very specific. Click [here](#) to learn how to achieve that setup.



**Note:** The following stages do **NOT** allow you to change the tracking color:

- Waiting Room
- Triage
- In Progress
- Finished
- Scheduled
- Curbside
- Note
- Checked Out

5. Click the **Save** button.
6. Once all changes are made and saved, close the window.

Version 14.10

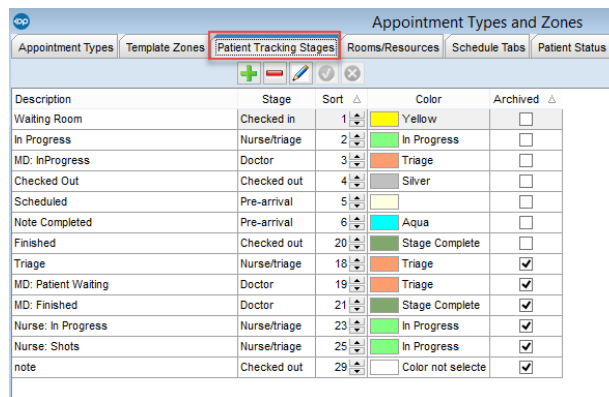
### Utilities > Manage Practice > Appointment Preferences

## Overview


Patient Tracking Stages allow all staff to see the exact stage of a patient's visit during their time in the office.



## Adding Patient Tracking Stages

1. Navigate to Appointment Preferences using the path above.
2. Click the **Patient Tracking Stages** tab.




Description	Stage	Sort	Color	Archived
Waiting Room	Checked in	1	Yellow	<input type="checkbox"/>
In Progress	Nurse/triage	2	In Progress	<input type="checkbox"/>
MD: InProgress	Doctor	3	Triage	<input type="checkbox"/>
Checked Out	Checked out	4	Silver	<input type="checkbox"/>
Scheduled	Pre-arrival	5		<input type="checkbox"/>
Note Completed	Pre-arrival	6	Aqua	<input type="checkbox"/>
Finished	Checked out	20	Stage Complete	<input type="checkbox"/>
Triage	Nurse/triage	18	Triage	<input checked="" type="checkbox"/>
MD: Patient Waiting	Doctor	19	Triage	<input checked="" type="checkbox"/>
MD: Finished	Doctor	21	Stage Complete	<input checked="" type="checkbox"/>
Nurse: In Progress	Nurse/triage	23	In Progress	<input checked="" type="checkbox"/>
Nurse: Shots	Nurse/triage	25	In Progress	<input checked="" type="checkbox"/>
note	Checked out	29	Color not select	<input checked="" type="checkbox"/>

3. Click the **Insert Record** button .
4. Enter the following information:



- **Description:** the name of the Patient Tracking Stage. This is what will be displayed on the Patient Tracking screen in the Visit Status column.
  - **Stage:** identifies the visit status stage.
  - **Sort:** the numeric order in which the Patient Tracking Stages are displayed in the drop-down menu.
  - **Color:** the color of the appointment when it is in this tracking stage. Do not edit Checked Out
  - **Archived:** select the Archived checkbox to indicate that the archived status is no longer in use and will not be displayed in the drop-down menu.
5. Click the **Post Edit** button .
  6. Once all changes are made, click the **Exit** button .

## Edit Patient Tracking Stages

1. Click the **Patient Tracking Stages** tab.
2. Click to highlight the item to modify.
3. Click the **Edit Record** button .
4. Edit any field (Description, Stage, Sort, Color, Archived).



**Note:** If your practice has enabled the System Preference to automatically reset visit stage when encounter notes are opened, the setup for Patient Tracking Stages is very specific. Click [here](#) to learn how to achieve that setup.

5. Click the **Post Edit** button .
6. Once all changes are made, click the **Exit** button .