

Last Modified on 03/19/2024 4:34 pm EDT

Office Practicum

Version 14.19



Our new Multi-Location Calendar updates are here! Please see the**OP 21.3 Calendar Articles** for an overview of the changes. Practices can configure OP to **switch to the new calendar** and explore its features.

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

Overview

This page will instruct you on how to manually confirm appointments.

Confirming Appointments

- 1. Click on Schedule button.
- 2. Click on Tracking radio button.
- 3. Select the date for the appointments that you are confirming.

	My Vie	v Offic	ce View										00
1	Date:		Show (● All O Mine	Expand grid	Exclude checked out	😣 Validate	Confirm					
Ŀ	6/17/20	19 ~	(DC	→ Auto refresh	Show billing panel	Send Message	Statements					
	Suff a												
3	Ti	ne	Δ	Patient	Reason	TOV	Visit Status	Tasks	Billing Status	Confirm Status	Appointment Text	Phone #	
Þ	Staff : SLOANE KNOX, MD (COUNT=2)												
	10:1	5 AM	ENGLIS	H, ATHENA	11-12 yr F (default)	WELL VISIT, EST				Unconfirmed	WELL VISIT, EST: 11-12 yr F (default) SJK	555-555-4756	
	10:4	5 AM	ENGLIS	H, CALLIE	11-12 yr F (default)) EXTRA TIME WEI			2	Unconfirmed	EXTRA TIME WELL: 11-12 yr F (default) SJK	555-555-4756	
	Staff : THEO WARNER, MD (COUNT=4)												
	09:0	MA 0	JONES,	DAVID	4 years (default)	WELL VISIT, EST				Unconfirmed	WELL VISIT, EST: 4 years (default) CLM	555-122-3344	
	10:1	5 AM	CLEME	NTS, SPENCER	Cough	SICKVISIT, EST			1	Unconfirmed	SICKVISIT, EST: Cough CLM	555-555-1210	
	10:4	5 AM	KNAPP	ZACHARIAH	9-10 yrs M (defaul	t) WELL VISIT, EST				Unconfirmed	WELL VISIT, EST: 9-10 yrs M (default) CLM	555-555-2272	
	01.0	0.014	OPP D	ONNE	Headache	SICKMENT EST				Unconfirmed	SICKVISIT EST: Headache CLM	555-555-0070	

4. On the top left of the Tracking window data grid, click on the Hidden Column button 🗄 to add Phone # to the view.



5. From here the user can either work down the schedule and call patient's confirming their appointments, then manually change the confirmation status to the appropriate type of confirmation or if the office would prefer to do confirmations on paper, then there is a print option by clicking on the **Printer** Button .

Version 14.10





Path: Smart Toolbar > Schedule button > Tracking tab

Overview

This page will instruct you on how to manually confirming appointments.

Confirming Appointments

- 1. Click on Schedule button .
- 2. Click on **Tracking** tab 🇳 Tracking
- 3. Select the dates for the appointments that you are confirming.

Å	[F7] Schedule and Practice Workflow									×			
3	B Calendar		2/16/2017		Show AI	() Mine	 Expand grid Auto refresh 		Exclude checked out Show billing reconciliation				
1	Tracking			Nurse	¥ .								
12	Messages (4)	Sta	ıff ∆										
2 -	Tasks	3	Time	Δ	Patient	Reason	TOV	1	🔮 🛛 Confirm Status	Appointment Text	Phone #		
D	Encounters (3)		Staff : Jen	na T	est(COUNT=4)	11.12 µr E (defe	EST IMELL	_	Confirmed	EST WELL: 11-12 vr F (default) - JES	215 866 2222		
2.	Well Visits (1)	F	10:30 AM		TEST BALLEY	Wheezing	EST SICK VIST		Confirmed	EST SICK VISIT: Wheezing JES	000-000-1021		
000	Diag Tests (8)		11:00 AM	_	CBMJI, ANTHONY	Ear pain	EST SICK VISI		Confirmed	EST SICK VISIT: Ear pain JES	215-451-8089		
*	Referrals		11:30 AM		TEST, CHANNING	9-10 yrs M (defa	EST WELL	(Confirmed	EST WELL: 9-10 yrs M (default) JES	000-000-1002		
e	Scanned (1)	E	Staff : Onl	y Nu	rse (COUNT=1)								
	Surveys (1)		11:00 AM		TEST, TEDDY	Allergy Shot	NURSE VISIT	(Confirmed	NURSE VISIT: Allergy Shot ON	000-000-1008		
	= Dv												
18	e-rox												

4. On the right hand side of the Tracking window, click on the Hidden Column button 🔳 to add Phone # to the view.

1	Time 🛆	Patient	Re
	Staff	EST (CO	UNT=1)
V	Time	OHN	Ear pain
V	Patient		
V	Reason	ARA (COL	JNT=2)
V	TOV	ATIENT, I	CHEST P.
V	Arrival	UCTO DU	
V	Room	VICTORIA	CARBUN
V	Visit Status		
V	Min.		
V	CheckList		
V	Billing Status		
V	Ins. Valid		
	Verification #		
V	Ins. verification b	tn	
V	CheckOut		
V			
V	CoPaid		
1			
V	Confirm Status		
	Appointment Text		
	Phone #		
	S.		
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5. From here the user can either work down the schedule and call patient's confirming their appointments, then manually change the confirmation status to the appropriate type of confirmation. If the office would prefer to do confirmations on paper, then there is a print option by clicking on the **Printer** Button 3.

