

View Appointments From Patient Tracking

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Version 14.19

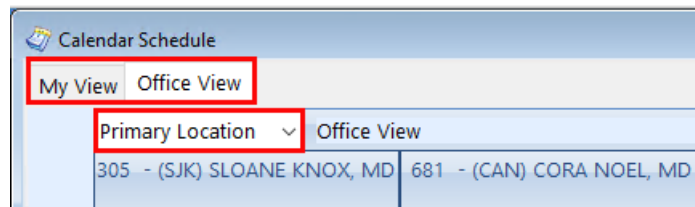


Our new Multi-Location Calendar updates are here! Please see the [OP 21.3 Calendar Articles](#) for an overview of the changes. Practices can configure OP to [switch to the new calendar](#) and explore its features.

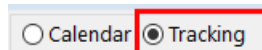
Overview

This section will instruct users on how to view appointments from Tracking in the Schedule. Though Tracking can be used by any staff member, it is most often used by the Clinical staff and Providers during a patient's visit. To view appointments from Tracking:

1. Click the **Schedule** button located in the **Clinical, Billing, or Practice Management** tab. The **Calendar Schedule** window opens.
2. Select the appropriate schedule tab and practice location located at the top of the Calendar window.



3. Click the **Tracking** radio button located above the right-hand corner of the schedule. The **Tracking Schedule** window displays.



Additionally, the following options may be available in the Tracking Schedule:

- The date may be changed in order to view appointments for another date.
- Task numbers shown in the Tasks column may be specified to include All, Mine, or a specific department (selected from the dropdown).
- You can exclude from view appointments that have been marked Checked Out.
- You can exclude from view appointments for patients who have not been checked in.
- You can choose to Show Billing Reconciliation.
- You can print the Tracking window as it is displayed.
- You can validate insurance for patients on the schedule.
- You can confirm appointments or send messages.
- You can print statements for patients on the schedule who have a balance.

Version 14.10

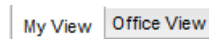
Overview

This section will instruct users on how to view appointments from the Tracking tab in the Schedule and Practice Workflow window. Though the Tracking tab can be used by any staff member, it is most often used by the Clinical staff and Providers during a patient's visit. To view appointments from Tracking:

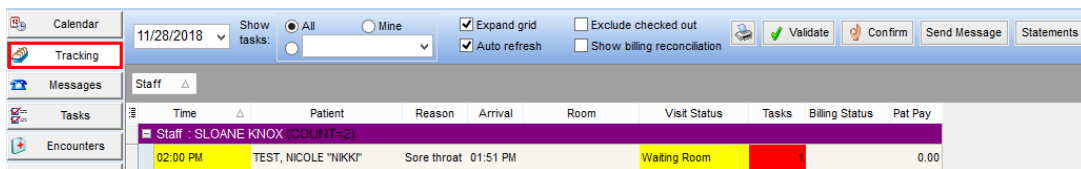
1. Click the **Sched** button on the Smart Toolbar. The Schedule and Practice Workflow window displays.
2. For multi-location practices, select the Location of the appointments you would like to view from the dropdown list.

OPUC	▼ Office View
Location	Address
OPUC	602 W Office Ctr Dr
Cherry Tree Pediatrics	17 Cherry Tree Lane
Alpine Falls Pediatrics	5 Walnut Grove Dr

3. If **Schedule tabs have been enabled** select the appropriate tab located at the bottom of the Calendar window.



4. Click the **Tracking** tab located to the left of the schedule.



Time	Patient	Reason	Arrival	Room	Visit Status	Tasks	Billing Status	Pat Pay
02:00 PM	TEST, NICOLE "NIKKI"	Sore throat	01:51 PM	Waiting Room				0.00

Additionally, the following options may be available in the Tracking window:

- The date may be changed in order to view appointments for another date.
- Task numbers shown in the Tasks column may be specified to include All, Mine, or a specific department (selected from the dropdown).
- You can exclude from view appointments that have been marked Checked Out.
- You can choose to Show Billing Reconciliation.
- You can print the Tracking window as it is displayed.
- You can validate insurance for patients on the schedule.
- You can confirm appointments or send messages.
- You can print statements for patients on the schedule who have a balance.