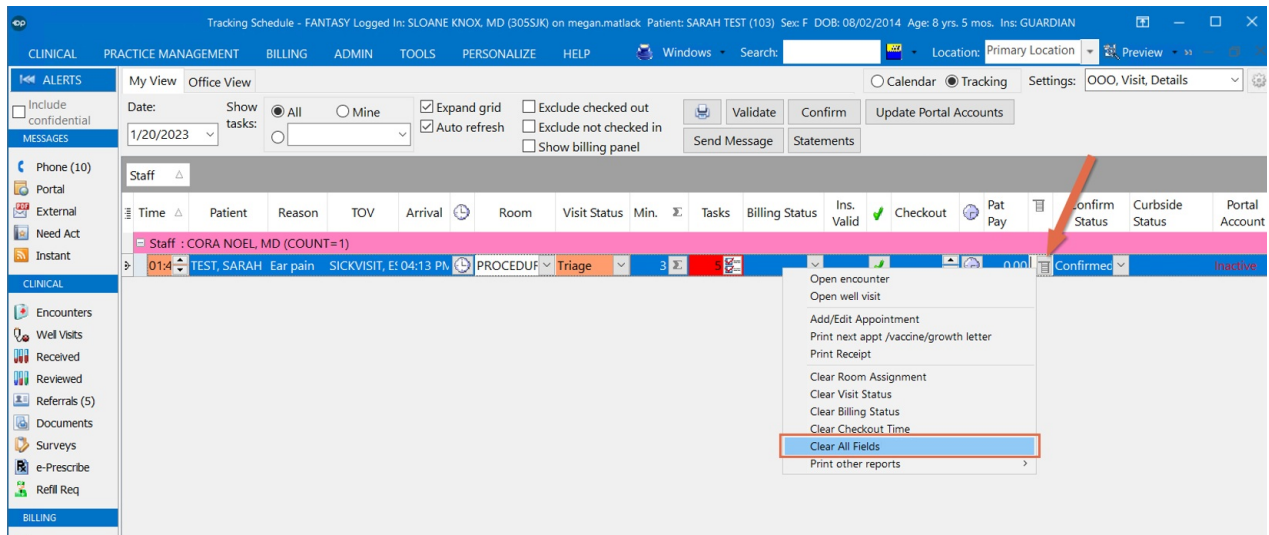


Register/Schedule/Check In/Check Out FAQs

Last Modified on 07/21/2023 11:22 am EDT

How do I reset a patient visit status for an appointment?

Right-click on the patient's appointment from Tracking and select **Clear All Fields**.



How do I unlink siblings?

To unlink patients/siblings, simply break the selection that caused the linkage.

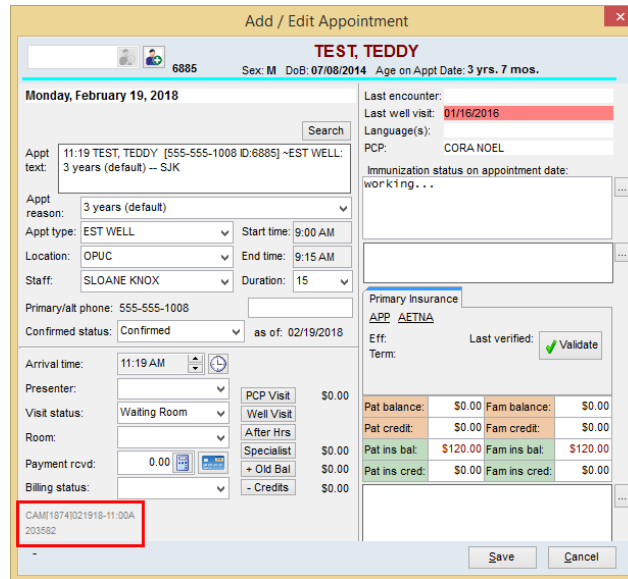
- To unlink patients **socially**: deselect the checkmark in the **Res?** column in the Family Contacts window of the Patient Chart.
- To unlink patients **financially**: change the selected contact in the **Patient Responsibility Guarantor** at the top of the Insurance window of the Patient Chart.
- To unlink patients **genetically**: change the genetic parent(s) indicated in the **Family** tab of the patient's History (**Patient Chart > History > Family tab**).


For information on how patients are linked in OP [click here](#).

How can I see who scheduled an appointment?

To see who scheduled an appointment:


1. Navigate to the **Schedule**.
2. Double-click the appointment to open the Add/Edit Appointment window.
3. In the lower-left corner of the Add/Edit Appointment window, you will see the initials of the person who scheduled the appointment in addition to the date and time of scheduling.



 **Note:** This information is not displayed if the appointment was Live Scheduled on the Patient Portal.

How do I copy the setup of one schedule tab to another?

You can choose to save the properties of a selected schedule tab as the default for your calendar and apply it to other calendar tabs. To do so:

1. Navigate to the schedule tab that you would like to copy to another tab.
2. Click the **Schedule Properties** button .
3. After making any necessary edits to the properties, click **Save as Default**.
4. Click **Yes** in the confirmation window to store the settings as the template.
5. Click **OK** to exit the Schedule Properties window and return to the Highlighted Calendar window.
6. Select the schedule tab where you would like to apply the saved default properties.
7. Click the **Schedule Properties** button.
8. Click **Reset**.
9. Click **Yes** to reset the schedule settings to default values.
10. Click **OK** to exit the Schedule Properties for Highlighted Calendar window.

How do I display the Exclude Billing Complete checkbox on the Tracking Window?

To show Exclude Billing Complete on the Tracking window, you want the **Calendar** tab to be set to Billing Stage. Once selected, the Exclude Billing Complete checkbox will appear in the **Tracking** tab. To do this:

1. Click the **Sched** button.
2. Select the **Calendar** tab.
3. From the Calendar tab, select **Billing stage** in the Status color field.

Column names:

Staff
 Room

Schedule text:

Details
 Name only
 x (hidden)

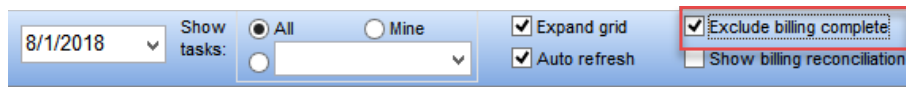
Status color:

Visit stage
 Billing stage

Show columns:

Not assigned
 Out of office

4. Click the **Tracking** tab. The Exclude Billing complete checkbox is visible.



8/1/2018 Show tasks: All Mine Expand grid Exclude billing complete Show billing reconciliation
 Auto refresh

5. Click the **Pref** button on the Smart Toolbar to save this as your preferred setting.

How do I sort patient contacts?

To re-sort the order of a patient's contacts, follow these steps:

1. Select the **Patient Chart** tab from the top menu.
2. Search for and select the patient whose contacts you would like to re-sort.
3. Click the **Contacts** (Family Contacts or Clinical Contacts) tab.
4. Select the contact you'd like to move up or down in the sort order.
5. Use the **up** and **down arrows** to move the contact up or down in the sort-order list.
6. Click the **Fix Sort** button
7. Review the Information box.
8. Click **OK**.

How do I create a Wave Schedule in OP?

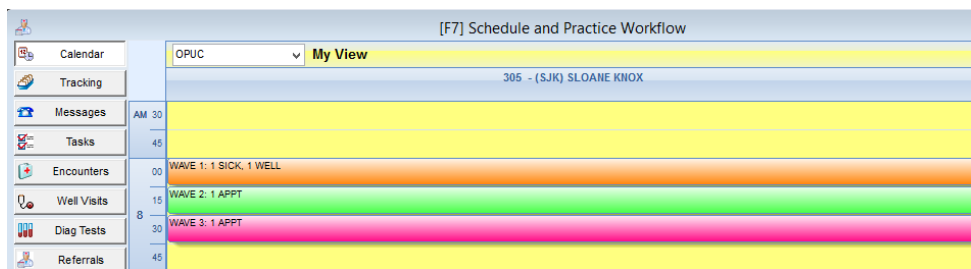
In order to create a Wave Schedule, you must first review the **Template Zone** setup for your Practice. You will want to ensure that you have the following:

- An Appointment Zone that will be used for the first wave of scheduling called whatever your Practice determines will be the format. For example, if you will double book at the top of the hour with a Sick and a Well Visit, call the Zone Wave 1: 1 Sick, 1 Well.
- An Appointment Zone for each other Wave of scheduling. For example, Wave 2, Wave 3, etc. You may also include in the name of the zone how many appointments should be scheduled there to assist your scheduling staff.
 - The Zone color for these particular zones should be different than that of your other Appointment Zones and unique from one another. This color difference will visually help the scheduling staff so that the zones do not appear to overlap.
 - The Protection Status should be set to **Not Protected**.
 - You may select Owner Protected if a particular wave should only be scheduled in by an Administrator or the schedule owner.
 - The Purpose should be set to **Any Encounter** unless your Practice wishes to track the amount of slotted time delegated to Wave scheduling. You may create a Zone Purpose called Wave Scheduling specifically to calculate this by going to the **Zone Purpose** tab.
 - The Max Apts should be set according to how many appointments are allowed to be scheduled at the same time.

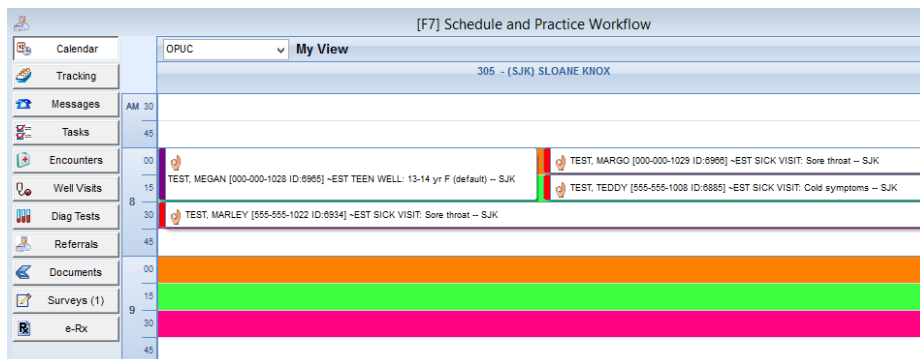
For Wave 1, select 2 so that no more than 2 appointments are scheduled. For waves where only one appointment may be scheduled, select 1. Setting the Max Appts to zero applies no limit to the number of appointments that may be booked in one time slot. Only Practice Administrators or the individual who owns the calendar can override the Max Appt setting at the time of scheduling.

Appointment Types and Zones						
Appointment Types	Template Zones	Zone Purpose	Patient Tracking Stages	Rooms/Resources	Schedule Tabs	Patient Status
Owner Protected zones can only be scheduled by the owner or a staff member with override privileges. Same Day Only zones cannot be scheduled until the date of service.						
Appointment Zone	Zone Color	Protection Status	Purpose	Max Appts		
WAVE 1: 1 SICK, 1 WELL	Orange	Not Protected	Any Encounter	2		
WAVE 2: 1 APPT	Green	Not Protected	Any Encounter	1		
WAVE 3: 1 APPT	Pink	Not Protected	Any Encounter	0		

Then, you need to apply the Template Zones to slots in your calendar. For more information on using slots, [click here](#).



Your schedule will look like the image below, once appointments have been scheduled.

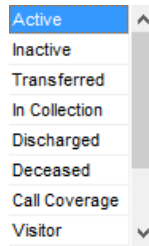


Note: In order for the concept of Wave or Modified Wave Scheduling to be successful in your practice, review the meaning of all of the zones you have put into place with your scheduling staff. Wave scheduling may require the scheduling staff to modify the appointment time that is confirmed with the parent or patient.

How do I change a patient status in the register?

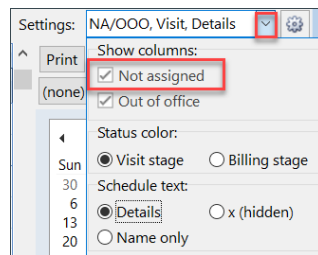
A patient may be discharged, transferred, or become deceased. This would require your practice to change the patient status. To change a patient status:

1. Click the **Register** button.
2. Search for and select the patient.
3. Click the Status dropdown and select the appropriate status from the Status list.

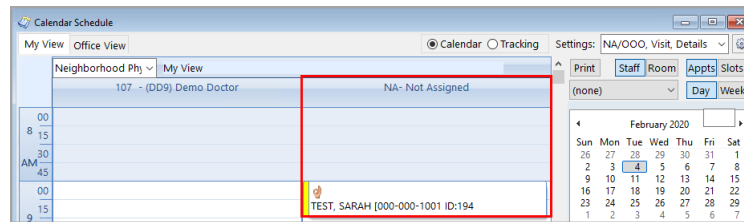



Why are there appointments in the Not Assigned column?

The **Not Assigned** column, when included in the calendar settings, displays appointments that are scheduled with a provider or staff member whose schedule is not included in the user's selected calendar view.



Example: In the image below, Sarah Test's appointment, which is scheduled with Albert Davis is displayed in the Not Assigned column.



By clicking properties button  and reviewing the Schedule Properties for the user's My View calendar tab, you can confirm that provider, Albert Davis is not included in the selected calendar.

