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Version 14.19

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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.

## **Pop-up Alerts**

Pop-up alerts can be created in both the Miscellaneous Notes and Billing Notes for a patient. You can create this pop-up by including a 'stop code' in the Miscellaneous or Billing note that requires review by the front desk or staff who will be scheduling appointments or checking in patients. To do so, insert the stop code ("@@") at the beginning of the note. Then, the next time the staff attempts to schedule or check-in the patient, the note will appear on the screen.

Add/E	dit Ap	point	ment												$\times$
				106	C Sex: F	HAN Dob:1	NNIN 2/01/20	<b>G, STO</b> 16 Age o	CKAF n Appt	<b>RD</b> Date:	2 yrs. 4 m	05.			_
Mond	ay, Ap	oril 1,	2019			S	earch	Last end Last we Langua	counter II visit: ge(s):	12/03	/2018				
Appt text:	CHAI DOB SJK	NNIN :12/0	Patient I	Register: Note	s and Coo	rdina	tion of (	Care	_	THEO		×	nent	date:	
Appt reasor	. 2	year !	Miscella 35	Characters		lotes	Coord	of Care	Conse	nt Tra	cking		ay 01/2 01/2	020 - 020 -	"(
Appt t Locatio Staff: Prim/al Move-I Confirm Arrival	ype: V on: F S t pho up op m stat time:	VELL Primai iLOAI ne: tion: us:	@@ Thi	is is the Billing	1 Notes fie	ld.							√	/alidate	
Preser Visit st	iter: tatus:		1	6					<u>S</u> ave		<u>C</u> ancel		ce: :	\$0.0 \$0.0	0
Room: Payme Billing	nt rcv	d: s:	106 ST		Specialis + Old Ba - Credits	it al	\$0.00 \$0.00 \$0.00	Pat ins ( @@ Th	cred: iis is the	\$0.0 e Billir	00 Fam in ng Notes 1	s cri field	al: ed: J.	\$652.0 \$0.0	0 0 
JMSI203 1865 -	1310401	19-04:4	40P								Save	_		<u>C</u> ancel	

Additionally, the inclusion of this stop code will color the Miscellaneous Note section of the Clinical Overview and the Billing Note section of the Account Summary (in the Patient Chart) in red to make it more visible to the user.

Patient Chart: STOCKAR	D CHANNING (106)	Sex: F DOB: 12/0	01/2016 Age: 2 yrs.	6 mos. Ins: A	ETNA HMO	Patient Chart: STOCKAR	D CHANNING	(106) Sex F DOB: 12/01	2016 Age:	2 yrs. 6 mos.	Ins: AETNA I	HMO					
	Photo / Demog	raphics / Critic	al Dates:			۵.	Account	t Summary						Charges /	Aging:		
No privacy restrictions		Last well visit: Last sick visit:	12/03/2018			No privacy restrictions	PCP: Prim Ins:	THEO WARNER, MD AHM AETNA HMO	Copay PCP:	\$15.00	Stateme Send to:	nts RICHARD CHANN	NG	OWES	Patient:	Patient \$0.00	Insurance \$652.00
Include confidential	NO PHOTO AVAILABLE	Next appt: PCP: Primary ins:	None THEO WARNER AETNA HMO	MD		Surveys	Sec Ins:	78967899999	Well: Special: After hr	\$0.00 S:	Method: Credit C Name:	MAIL ard on file None		CREDITS	Family: Patient: Family:		\$652.00
Care Plans  Care P		Second ins: VFC eligible: Pref language	NO			<ul> <li>Development</li> <li>Asthma Plans</li> <li>General Notes</li> </ul>	Status: VFC:	Active NO	Co-ins s	%: <b>\$0.00</b>	Card #:			AGING Ref date	< 30: 1-60: e 1-90:		
Referrals/TOC	Family:					DEMOGRAPHICS	Name			Role/Reason Bal Owed C		Credit Bal	O Pat resp	sp 90:		\$652.00	
Problem List O Allergies	RICHARD CHAN	ne INING	A Role/Reason	Authority Joint	Res? Prtl?	Basic Information	RICHARD C	CHANNING CHANNING	F	Father Mother		\$0.00 \$0.00	\$0.00 \$0.00	Billing No @@ This is	tes: the Billing	g Notes field.	^
<ul> <li>Medications</li> <li>Immunizations</li> </ul>	ELIZABETH CHA		Mother	Joint		Family Contacts	Open Claims:   Patient  Family										
History     History     History     Wids/Growth     Diagnostic Tests     Oriek Assessment     Surveys     Surveys	Item	Most Recent Info		Last	Date 🚰	Clinical Contacts	Claim #	Ilaim Date Patient 12/03/201 CHANNING	Ins , § AHM	Insured ID 78967899999	Provider Theo Wa	Charge Ins Bal 652.00 652.00	Pt Bal Cat Q1				
	Diag Test     Fluoride Varnish Applied 12/3/2018				Summary Insurance												
Asthma Plans General Notes	Encounter     Preventive encounter	Encounter      Preventive encounte Two year well visit: 12/3/2018			Claims	Due/Overdue Tasks:											
DEMOGRAPHICS	Miscellaneous Notes:			S Credits	Department Name 💧												
Basic Information	@@ This is the M	vlisc Notes field				Statements	Due D	Date Stat	us	Ord	ered By	Compl	eted By				~

Version 14.10





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Pop-up alerts can be created in both the Miscellaneous Notes and Billing Notes for a patient. You can create this pop-up by including a 'stop code' in the Miscellaneous or Billing note that requires review by the front desk or staff who will be scheduling appointments or checking in patients. To do so, insert the stop code ("@@") at the beginning of the note. Then, the next time the staff attempts to schedule or check-in the patient, the note will appear on the screen.

Add / Edit Appointment		×
test 🔊 🍙 685	TEST, M 3 Sex: M DoB: 12/24/2012	IRANDA Age on Appt Date: 5 yrs. 10 mos.
Thursday, October 25, 2018	L Search	Last encounter: Last well visit: NOT FOUND Language(s):
Appt text: Miscellaner Appt reason: 35 0	ister: Notes and Coordination of us Notes Billing Notes Coord of characters	Care X ate: mended
Appt type: @@ This is Location: Cherry T Staff: Susan Ki Primary/alt phone: 8i Confirmed status: C Arrival time:	the Billing Notes field.	ance / Validate
Visit status: Room: Payment rcvd: Billing status:	NDATEST + Old Bal \$25.42 F - Credits	Save Cancel S25.42 Save Cancel S25.42 Status cred. Fam ins cred. @@ This is the Billing Notes field
SJK[305]102518-03:45PM 203702 -		Save Cancel

Additionally, the inclusion of this stop code will color the Miscellaneous Note section of the Chart and Billing Note section of the Patient Account in red to make it more visible to the user.

8] Patient Cha	rt														
à	🛛 🛷 🔟 MIRANDA TEST (6853) Sex:	M DOB: 12/24/2012	Age: 5												
Overview	Photo / Demographics / Critical Dates:														
Care Plans	Last well visit:			[ _										_	
Tasks	Last sick visit:	[F12] Patient.			2										
Encounters	NO PHOTO PCP: Demo Doctor	1	2												
Wall Vieże	AVAILABLE Primary ins: AETNA HM		Overview	Demographic		Charges / Aging:									
vvei visits	VEC eligible: NO				PCP: Demo Doctor		Copa	Conav		Statements		CUADCER	Patient	1	
x Messages	Preferred language:				Prim Ins: A	ns: AHM AETNA HMO PCP: \$10.0		0.00 \$0.00	Send to: FATHE	ER TEST	CHARGES Balanco owod:	\$25.42	ir		
Referrals/Trans	Family:		Charges	W	W111111111 Welt			Method: MAIL			Earriby owned	\$25.42	╢╴		
Problem List	Name	n Authority Res? Prtl		Claims	Sec Ins: M	OLINA MOLI	NA Spec	iat: \$0	.00 \$0.00	Credit Card o	n file	opporte p //	020.42	ŀ	
Allergies/Rxns	<no data="" display="" to=""></no>			Payments	0	00000000	After	hrs:		Name: None	_	CREDITS Patient:	\$10.00	łĻ	
Medications	Tasks and Care Plan Due Items:	asks and Care Plan Due Items:				Status: Active Co-ins %: \$0.00 \$0.00 Card #:			-	Family:	\$10.00				
/ Immunizations	Item Most Recent Info	item Most Recent Info Last Date 🖉 🔨 🔨					Statements								
History	Encounter			Tasks	New Deletheres Del Owerd Condition							Ref date: 31-60:		ĮL	
P mistory	Preventive enco			M		Name		Role/	keason	Ballowed Ch	edit Bai	Service 61-90:		ĮL,	
Vitals/Growth	Measurement			incasuges	<no data="" display="" to=""></no>								\$25.42		
Diagnostic Tests	Height			Consents	Open Claims:							Billing Notes:			
Risk Assessmen	t Weight			Disclosures	Claim #	Claim Date	Patient	Ins	Insured I	Provider	Charge	@@ This is the Billing No	ites field.		
Development	Most recent BM	San and a second		Scope	205639 12	2/22/2015	TEST, MIRANDA	AHM	W11111111	11 Susan J. Ki	135.00				
Surveys	Screening			Patient	205642 12	2/22/2015	TEST, MIRANDA	AHM	W11111111	1 Susan J. Ki	90.00				
Asthma Plans	Hearing screen	8		Family	205702 11	1/12/2015	TEST, MIRANDA	AHM	W11111111	1 Susan J Ki	195.00				
Oceanal Nata	Vision screen	<u> </u>			230702			P							
General Notes	Vital Sign														
b Consents	Miscellaneous Notes:		*												
Include	@@ This is the Misc. Notes field.														

