

### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

# Can Visit Stages be set up to change automatically?

Last Modified on 02/06/2020 3:51 pm EST

In the Schedule tab within the System Preference window there is a preference to "Automatically reset visit stage when encounter notes are opened." This setting only applies to the lowest sort number for the following OP stages:

- **Nurse/triage**
- **Doctor**

Once a staff member with a Clinical level of the "Clinical Staff" or higher (which is set in the Staff Directory) opens the Encounter note, the Visit Stage in Tracking will automatically change to the lowest sort number for that stage (see example below).

- Once the Clinical staff member opens the encounter, the Visit Stage in Tracking will automatically change to the lowest sorted stage for Nurse/triage (we suggest **Nurse: In Progress**).
- Once the Provider opens the encounter, the Visit Stage in Tracking will automatically change to the lowest sorted stage for Doctor (we suggest **MD: In Progress**).

Review the image below. In order for the **Nurse: In Progress** and **MD: In Progress** to be the automated stages, the Patient Tracking Stages setup should appear as follows.

Appointment Types and Zones			
Appointment Types	Template Zones	Zone Purpose	Patient Tracking Stages
Description	Stage	Sort	
Waiting Room	Checked in	1	
In Progress	Checked in	3	
MD: InProgress	Doctor	5	
MD: Patient Waiting	Doctor	6	
MD: Finished	Doctor	7	Stage Complete
Nurse: In Progress	Nurse/triage	8	Triage
Nurse: Patient Waiting	Nurse/triage	9	Triage
Nurse: Finished	Nurse/triage	10	Stage Complete

Provider  
Trigger

Nurse  
Trigger



**Note:** This will also alter the color of the patient's appointment in the schedule (assuming the stages are not set to the same color).



**Note:** If you have previously edited your [Patient Tracking Stages](#), you will need to review your Stages. After making edits to the Patient Tracking Stages, you will need to log out of OP completely, exit the program, and relaunch to see the changes.