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.

OP 19 Enhancement FAQs

Last Modified on 02/21/2020 9:58 am EST

What are the Billing changes in OP 19?

OP 19 does not introduce any Billing workflow changes.

It does, however, introduce:

- The inclusion of the Billing group in the Main Navigation panel, complete with badging. This group contains the following items that can be clicked to access the respective area in the Billing Center:
  - **Claims:** Claims that have been created but not queued.
  - **Superbills:** Unprocessed Charges older than 30 days.
  - **Rejections:** Claims that have been rejected and not fixed aged 90 days.
  - **Queue:** Claims that have been queued but not sent.
  - **Remits:** Adjudications that have been processed but not posted.
  - **Not Ack (Acknowledged):** Claims that have been sent but not acknowledged for 90 days.
- The automatic addition of a patient's insurance payer and rendering provider to billing-related tasks. This occurs when a follow up task is created from any billing area (such as from the **Claims** in the patient chart, or from the **Billing Center**). For more information on searching for tasks by description, click **here**.

How do I register a new patient and schedule them in OP 19?

After confirming a patient record does not already exist in your system, a new patient can be registered one of two ways in OP 19. The workflow can be initiated from:

- The **Patient Chart** button in the **Clinical**, **Practice Management**, or **Billing** tab. Click **here** for detailed instructions on registering a patient using this method.

Note: To enter a placeholder on the desired appointment time slot while completing the patient's registration:

1. Click once in the offered time slot.
2. Type a note, such as: Hold for new patient, or simply Hold. That time slot will now be reserved.
3. Proceed with registering the new patient.
4. Return to the Schedule and double-click the reserved time slot. The **Add/Edit Appointment** window opens.
5. Search for and select the new patient. Upon selecting the new patient, the **Appt text** field will populate with that patient's information rather than the placeholder note you entered.

   If the new patient decided to not schedule an appointment at this time, simply select the placeholder, right-click and select **Delete appointment.**

- The **Schedule** via the **Add/Edit Appointment** window. To schedule a new patient using this method:

1. Navigate to the **Calendar** and double-click on the desired time slot. The Add/Edit Appointment window opens.
2. Conduct a patient search to ensure the patient does not already have a record in your system.
3. Click the **Create a New Patient with Appointment** button  .
4. Complete the fields highlighted in yellow: **Last Name / Suffix**, **First / Middle Name**, **Birth Date**, **Sex**, **Phone Number**.
5. Proceed with completing the appointment details and click **Save**. You will be notified via an information window of the new patient's chart number and be instructed to complete the full registration from the patient's chart at your earliest opportunity.

How is BMI calculated in OP?

In OP, you have the option to include the diagnosis for BMI% when charting a well or an encounter visit and the patient's height and weight measurements are entered in the Vitals/Growth window. From the **Assessment**, select the checkbox **Auto-calculate BMI code**.

Note: To include the BMI code on a well or encounter visit note you must select Assessment.

Selecting Assessment from a note will include the BMI Dx code on the Add/Edit Charges window.

OP uses the following codes for patients 2 to 20 years of age:

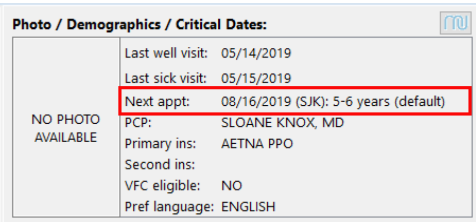
- Z65.51 (<5%)
- Z68.52 (5%<85%)
- Z68.53 (85%<95%)
- Z68.54 (=>95%)

OP uses the following codes for patients 21 years and older:

- Z68.21 to Z68.45 (BMI range 21+)

Can I see a patient's next appointment from the Chart?

Yes. A patient's next appointment is displayed in the **Clinical Overview** of the Patient Chart. If a patient does not have a future appointment scheduled, **None** will be displayed in the **Next appt:** field. The **Next appt:** field contains the date of the next appointment, the initials of the provider with whom the appointment is scheduled, and the appointment reason selected when the appointment was made.



A complete list of the patient's appointments can be accessed by simply clicking the text in the **Next appt:** field.

Can I search for tasks by the description?

Yes! OP 19 features a new way to search for similar tasks. This is useful across all departments.

1. Click the **Tasks** button in the **Clinical**, **Billing**, or **Practice Management** tab.
2. Set your Task search parameters.
3. In the **Description contains** field, enter the description for which you'd like to search.

4. Click **Search**. The grid will populate based on the search findings.

How do I add a Problem List item to the Assessment?

In OP, you have the option to add selected problems to the Assessment of a Well or Encounter note. From the Problem List:

1. Click the checkbox for **Auto-copy problems to encounter diagnosis list**
2. Select the paper clip on the problem(s) to be passed to the Assessment.

It is recommended to only save the selection of the checkbox as a preference in Well Visits. More commonly during Sick Visits, there may be problems upon your review where the diagnosis should not be passed to the Assessment.

How can I see only patients that have been checked in?

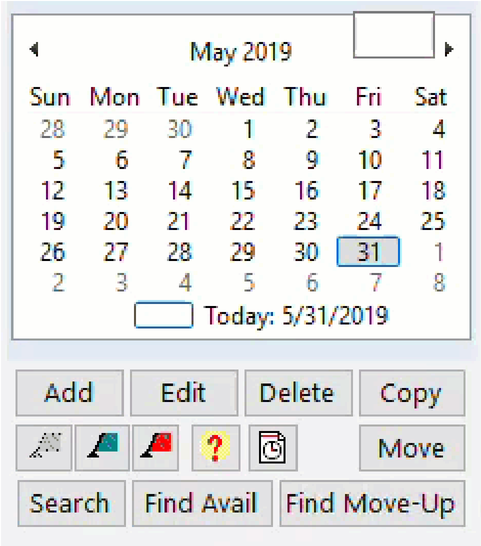
The Tracking Schedule now includes a checkbox to **Exclude not checked in**. Selecting this checkbox will exclude patients who have not checked in yet. Selecting the combination of the **Exclude checked out** checkbox and the **Exclude not checked in** checkbox provides users a view of only patients who are truly present in the office.

How can I quickly move forward in the schedule?

To move forward or backward in the schedule,

1. Locate the **Quick Move box** above the calendar in the Calendar view of the **Schedule**.
2. Enter:
    - A positive number to move forward in the schedule, or a negative number to move backward in the schedule
    - **D** to move the number of days, **W** to move the number of week, **M** to move the number of months, or **Y** to move the number of years

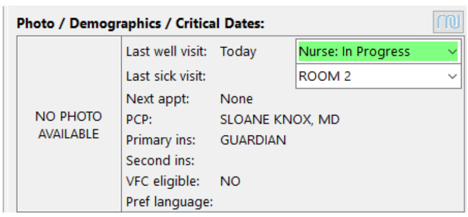
> **Example**: Please note, once the corresponding letter is typed on your keyboard, you will be taken to the date in the calendar. You will not see the letter that was typed. See the image below for a visual representation of moving forward 2 months and then backwards 2 months:



Where can I see and change the room and visit status?

In OP you have the ability to view and change visit status and room from within a Well and Encounter visit note. The selected Visit Status and Room appear in the top section on the Well Visit and Encounter note window. From the top of the Well Visit or Encounter note you can click the dropdown arrow in either field to change the selection.

In addition, the Visit status and Room are visible from the Clinical Overview of a Patient Chart. The Visit Status and Room appear in the top left of the Clinical Overview window. You can click the dropdown arrow in either field to change the selection.

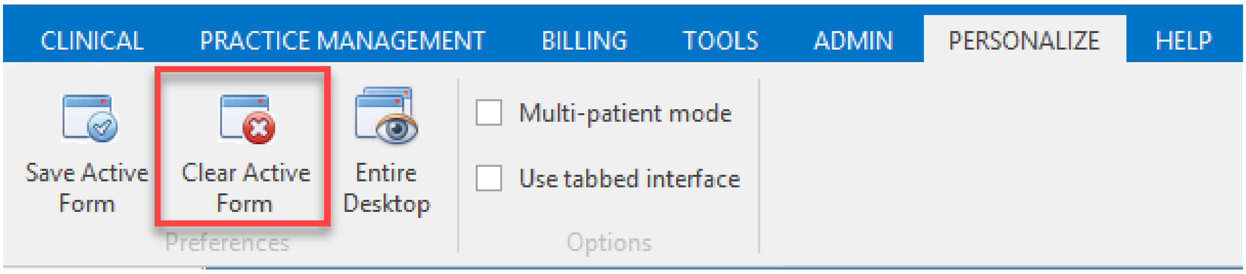


How can I revert saved preferences?

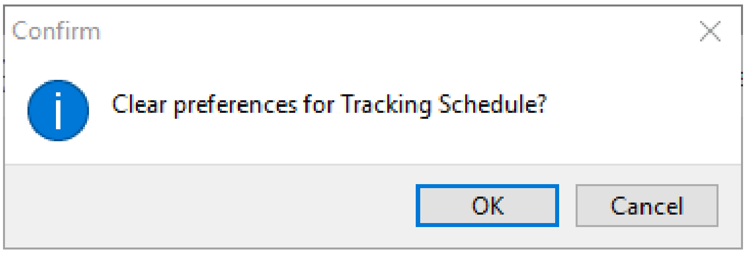
Clear Active Form

In OP you can save preferences. Some saved preference examples include displaying what window opens when opening a patient's chart or changing the button order in the patient chart. However, there may be instances where you wish to remove what was saved. To do this:

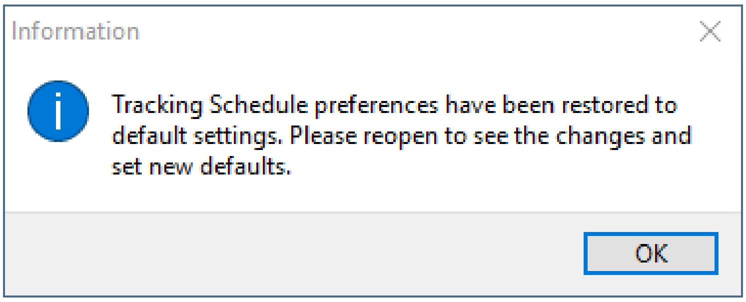
1. Select the panel or window where you wish to remove the save preferences.
2. Select the **Personalize** tab on the ribbon.
3. Click the **Clear Active Form** button.



4. A confirmation window displays. Click **OK**.



5. An information window displays stating the default settings have been restored,. Click **OK**. You will need to log back in to see the changes.

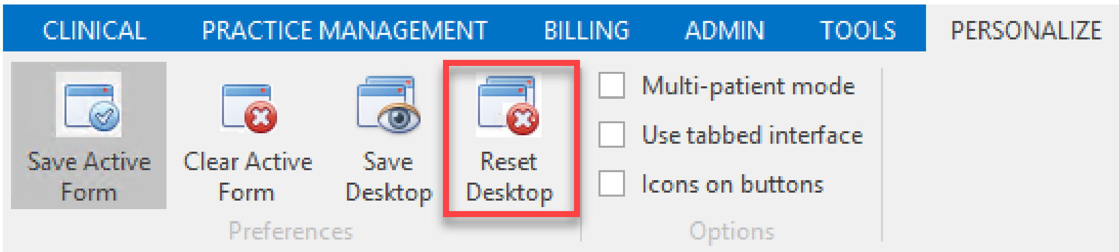


Reset Desktop

In OP you can save preferences.The Reset Desktop provides a user the ability to clear all current preferences and then replace those preferences with those from another user. This does not change permissions. It only changes personalizations.

1. Select the panel or window where you wish to remove the save preferences.
2. Select the **Personalize** tab on the ribbon.

3. Click the **Reset Desktop** button.



4. A warning window displays. Click **Yes**.
5. The **Reset Desktop** window displays. Select a reset action radio button.

6. Click the **OK** button.
7. The Information window displays. Click **OK**. You will need to exit and reopen OP.

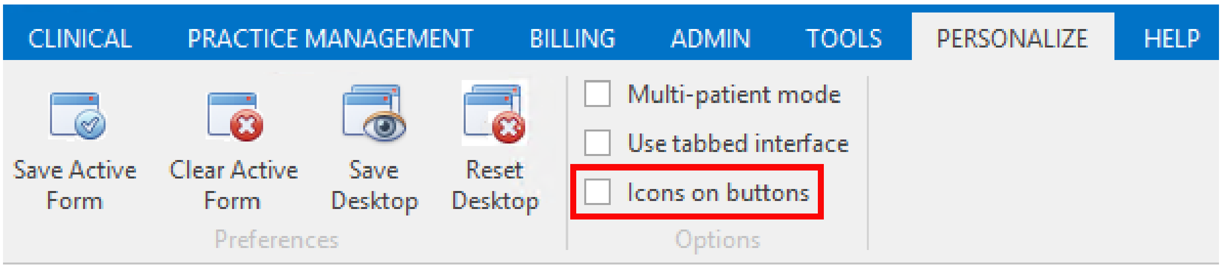
How can I see only unposted or out of balance ERAs?

OP 19 introduces the ability to see only unposted or out of balance ERAs. To do this, use the radio button is the **Posting Status** section of the **ERA Payments** tab of the Billing Center:

Can I choose to see icons instead of text on buttons?

For common actions such as New, Delete, Edit, Print, and Refresh, users can decide how they would like to see the buttons displayed. To make this selection:

1. Navigate to the **Personalize** tab.
2. Select the **Icons on buttons** checkbox if you prefer to see these buttons represented by an icon. Deselect the checkbox if you prefer to see text on these buttons.
3. Save this selection as a preference (optional).


CLINICAL
PRACTICE MANAGEMENT
BILLING
ADMIN
TOOLS
PERSONALIZE
HELP
Save Active Form
Clear Active Form
Save Desktop
Reset Desktop
Preferences
Multi-patient mode
Use tabbed interface
Icons on buttons
Options