

Important Content Update Message

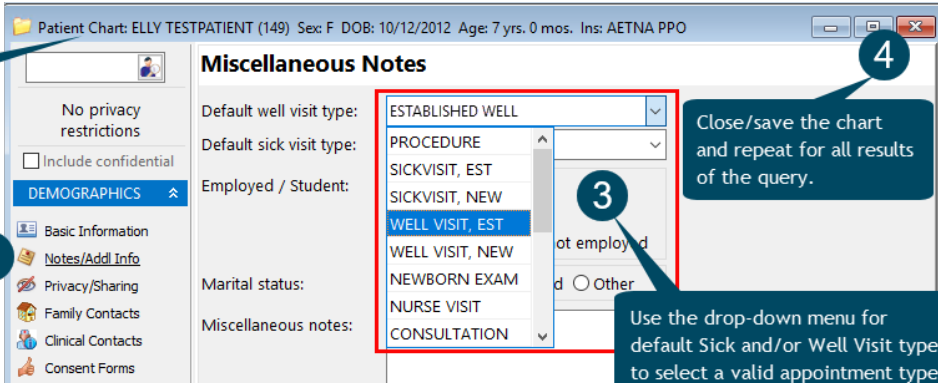
We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate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

OP Patient Portal Data Integrity: Appointment Type Cleanup- Patient Chart Default Resource Diagram

Last Modified on 11/21/2019 3:40 pm EST

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Notes/Addl Info

In order for appointments to flow to IntelliChart, Appointment Types must be reviewed and corrected, if necessary, on Patient Chart Defaults.



1. Navigate to and open the patient chart.

2. Click **Notes/Addl Info**.

3. Use the drop-down menu for default Sick and/or Well Visit type to select a valid appointment type.

4. Close/save the chart and repeat for all results of the query.

The screenshot shows the 'Patient Chart: ELLY TESTPATIENT (149) Sex: F DOB: 10/12/2012 Age: 7 yrs, 0 mos. Ins: AETNA PPO' window. The left sidebar has 'Notes/Addl Info' selected. The main area is titled 'Miscellaneous Notes' and contains fields for 'Default well visit type', 'Default sick visit type', 'Employed / Student', 'Marital status', and 'Miscellaneous notes'. A red box highlights the 'Default well visit type' dropdown menu, which is open to show a list of appointment types: ESTABLISHED WELL, PROCEDURE, SICKVISIT, EST, SICKVISIT, NEW, WELL VISIT, EST, WELL VISIT, NEW, NEWBORN EXAM, NURSE VISIT, and CONSULTATION. The 'WELL VISIT, EST' option is selected.