

Patient Tracking Summary

Last Modified on 09/20/2021 1:14 pm EDT

Version 20.0

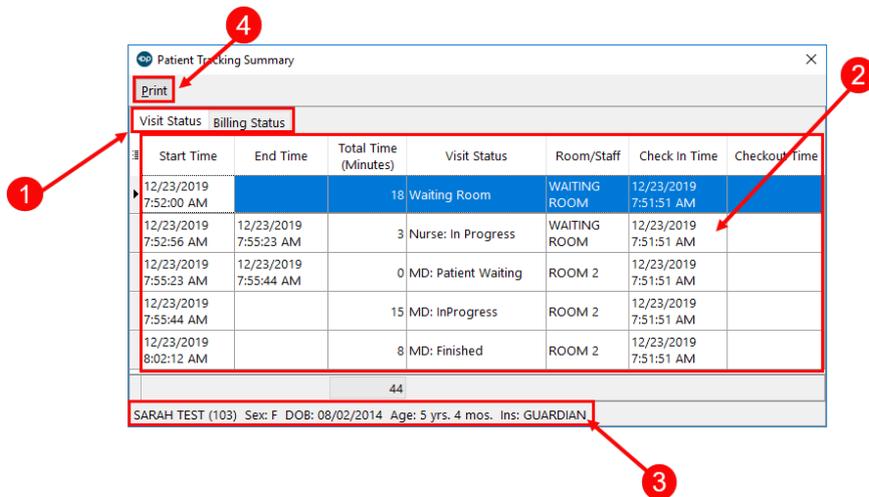


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Patient Tracking Summary

Path: Clinical tab, Practice Management, or Billing tab > Schedule button > Tracking radio button

The Patient Tracking Summary is accessed by navigating to the Tracking Schedule using the path above and clicking the Patient Tracking Summary button  for the specific appointment. This window maintains a list of Visit and Billing Status changes (in respective tabs) and a sum of the amount of time the patient's appointment was in each status. This is most commonly used to view a snapshot of the time it takes to progress through practice workflow.



The screenshot shows the 'Patient Tracking Summary' window. Callout 1 points to the 'Visit Status' tab, callout 2 points to the 'Billing Status' tab, callout 3 points to the patient information at the bottom, and callout 4 points to the 'Print' button at the top left.

| Start Time | End Time | Total Time (Minutes) | Visit Status | Room/Staff | Check In Time | Checkout Time |
|-----------------------|-----------------------|----------------------|---------------------|--------------|-----------------------|---------------|
| 12/23/2019 7:52:00 AM | | 18 | Waiting Room | WAITING ROOM | 12/23/2019 7:51:51 AM | |
| 12/23/2019 7:52:56 AM | 12/23/2019 7:55:23 AM | 3 | Nurse: In Progress | WAITING ROOM | 12/23/2019 7:51:51 AM | |
| 12/23/2019 7:55:23 AM | 12/23/2019 7:55:44 AM | 0 | MD: Patient Waiting | ROOM 2 | 12/23/2019 7:51:51 AM | |
| 12/23/2019 7:55:44 AM | | 15 | MD: InProgress | ROOM 2 | 12/23/2019 7:51:51 AM | |
| 12/23/2019 8:02:12 AM | | 8 | MD: Finished | ROOM 2 | 12/23/2019 7:51:51 AM | |
| | | 44 | | | | |

SARAH TEST (103) Sex: F DOB: 08/02/2014 Age: 5 yrs. 4 mos. Ins: GUARDIAN

Patient Tracking Summary

| Number | Section | Description |
|--------|-------------------------------|--|
| 1 | Patient Tracking Summary tabs | <ul style="list-style-type: none"> Visit Status: Displays the list of Visit Status changes throughout the patient's appointment. Billing Status: Displays the list of Billing Status changes throughout the patient's appointment. |
| | | <p>The grid displays Status change information specific to the tab selected. Each tab includes columns relevant to the Visit or Billing status. By default, the following fields are displayed:</p> <ul style="list-style-type: none"> Visit Status tab: <ul style="list-style-type: none"> Start Time End Time Total Time (Minutes) Visit Status Room/Staff |

| | | |
|---|---------------------|---|
| 2 | Summary Grid | <ul style="list-style-type: none">◦ Check In Time◦ Checkout Time• Billing Status tab:<ul style="list-style-type: none">◦ Start Time◦ End Time◦ Total Time (Hours)◦ Billing Status◦ Insurance Valid |
| 3 | Patient Information | For the selected appointment, the patient's information is displayed at the bottom of the Patient Tracking Summary window. |
| 4 | Print button | The Print button is used to print the information displayed in a selected tab. |