Set Intra-visit Work and Post-visit Work Visit Stages

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About

Each practice can determine which of their **Patient Tracking Stages** should be used to categorize their provider time-tracking into the 3 buckets: Pre-visit Preparation, Intra-visit Work, and Post-visit Work. **These settings are optional**. If no selections are made, all tracked time is presented as Total Time. This **does not** mean that time is not tracked. It simply means that it is not divided into buckets. Because the settings are made at the global level, they must be set by a Practice Administrator or another user with access to Global Preferences. As with all global settings, these selections apply to all providers across the practice.

Time Tracking:

☐ Start tracking intra-visit time when the doctor stage is [▼]

☐ Start tracking post-visit time when the stage is [▼]

> ❗Read these important points before selecting your Intra-visit Work and Post-visit Work bucket triggers
> - If a practice makes no selections: the tracked time is not categorized, and all time is presented as Total Time. **This is the default**.
> - If a practice selects only the Intra-visit bucket trigger: the time is categorized as Pre-visit Preparation and Intra-visit Work.
> - If a practice selects only the Post-visit bucket trigger: the time is categorized as Pre-visit Preparation and Post-Visit Work.
> - If a practice makes selections for both the Intra-visit and the Post-visit bucket triggers, the time is categorized as Pre-visit Preparation, Intra-visit Work, and Post-visit Work.

Set Time-Tracking Bucket Triggers

1. Navigate to the Clinic Info. tab of Global Preferences: **Admin tab > Global Preferences > Clinic Info. tab**
2. In the **Time Tracking** section of the window:
   a. Enable categorization of **Intra-visit** time by selecting the checkbox.
   b. Use the drop-down to select the Visit Stage that will start the categorization of Intra-visit Work.
   c. Enable categorization of **Post-visit** time by selecting the checkbox.
   d. Use the drop-down to select the Visit Stage that will start the categorization of Post-visit Work.
3. Close the System Preferences window.