



## Scheduling Patients

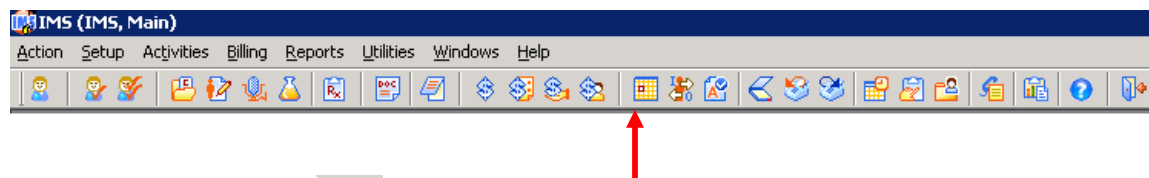
### Objective:

- Navigation thru Scheduler
- Making appointments for existing vs. new patients
- Searching patient appointments
- Entering patient details
- Print forms for patients prior to visits
- Right Click Schedule Options
- Right Click Patient Options
- Initiating Authorization Tracking from Scheduler (if applicable)

### Hot Keys

F2 - Patient Master  
F5 - Open Search Window  
F10 - Check In/Out  
Ctrl + F3 - Patient Note  
Ctrl + N - Add a New record  
Ctrl + E - Edit a record  
Ctrl + L - Cancel a record  
Ctrl + H - Search a record  
Ctrl + F5 - Refresh

F3 - Select Patient  
F9 - Schedule  
Ctrl + F2 - Reminder  
Ctrl + F6 - Patient Ledger  
Ctrl + Del - Delete a record  
Ctrl + S - Save a record  
Ctrl + R - Retrieve all records  
Ctrl + T - Sort



Click on Scheduling icon  on the toolbar or press F9.

### NOTES:

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## Left Panel

**Schedule for Alvarado, C**

Date: 10/28/2007

**October 2007**

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Office: 00001 - Office 55

Doctor/Room: Alvarado, CHARLES

No appointment

Day Week Month All

The left window displays Date, Calendar, Office choices, and Doctor/Room choices.

The schedule defaults to today's date; to select another date, enter a date in the date field or select a date on the calendar. Use the arrows < > to move between months and the arrows << >> to move between years. Use the T to go back to today's date.

Blue day is Today, red days are weekends, pink days are office holidays, and dark red days are doctor's holiday.

Below the calendar, users can select which schedule to display. Select an office and then select from the available providers or rooms within that office.

Each users can have the scheduler open with to a different default provide based on user parameters.

The order of the doctors in this drop down list can also be set per user. See Setup > Schedule > My Doctor Sequence.

The pink box below Doctor/Room select shows the number of appointments in the display area.

Day / Week / Month / All – allows user to view weekly / monthly appointments for selected doctor / room, etc. All – will provide a choice of All Offices / All Doctors / All Rooms

The default view can be set for the office; the options are daily, weekly, monthly, all Dr, all Room, all Offices. See Setup > Schedule > Parameters.

The bottom of the left panel displays details of any appointment highlighted in the main display.

## Color Legends

Confirmed	U- Unconfirmed	M- Missed	P- Pt. Canceled	D- MD Canceled
I- Check In	R- In Room	Q- Check Out	Not Available	Blocked Slot

Click on any part of this area to customize the color.

## NOTES:

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Background color can be set based on Procedure, Not Available and Blocked Slot. White background color represents time slots that are available. Text color varies on the appointment status (Confirm, Unconfirmed, Missed, Patient canceled, Doctor Canceled, Check In, In Room and Check Out).

Clicking on this button will show the patients waiting for an appointment. The number will depend on how many people are on the waiting list. This option can also be set per user. See Setup > Schedule > Parameters> Appointment Waiting = Yes/No.



Click each different view to change the views of the Scheduler screen by Day, Week, Month, All Doctors, All Offices, All Rooms

## Schedule Appointment

To schedule an appointment double click in the desired time slot. The appointment window displays allowing user to choose the patient, the procedure, etc.

To **choose a patient**, begin typing in the last name and hit "tab key"; the patient selection window will display allowing user to choose the patient.

If the patient does not exist in the system, the user can simply type in a name and not create the patient in the database.

(To enter a new patient, see Creating a New Patient at the end of this document.)

## NOTES:

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## Understand what IVR is

IVR (Interactive Voice Reminder)

Appointment Reminder:				
IVR:	Call By:	Status:	Attempt:	Reschedule?:
No ▾	Office ▾	Not Called ▾	▴ ▾	No ▾

The integrated IVR system can assist your staff in preventing missed appointments and to run your business more efficiently. You can setup parameters, by patient, to call them between certain times or to use certain phone numbers and based on those settings, IVR will call patients to remind them of their appointment either 1 or 2 days prior to their appointment, based on your preference. IVR will allow patients to cancel their appointment, if necessary, by pressing one key. With early notice of cancellations, staff will be able to re-fill the canceled slot and avoid unfilled slots, due to no-shows and missed appointments. IVR can provide a complete report including when and how many times the system calls patients.

## Initiate Authorization Tracking from the Schedule Entry window

Authorization:	
Require: <input checked="" type="checkbox"/> Medical ▾	<b>Pending</b>
Insurance: Blue Cross Payment Plan BSCP ▾	Note: <input type="text"/>
Ref. Dr. (?) Alvarado, Janice, MD ▾	

Check the box beside “require” if the procedure for the visit needs an authorization number. Patient insurance will be defaulted. You can enter a referral doctor.

After scheduling is done the letter “P” displayed on the appointment area indicates that the authorization number is still pending.

08:45 A - 09:00 A	Test, Jayson (PT00000173) DOB: 07/26/84 Zip: 50158 - EKG - Room 2	P 510-326-4566
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Other options within the Schedule window include **Special Instructions** and **User Defined Columns**.

**Special Instructions** appear on the right; click on the blue button to view all instructions. Instructions can be specific to procedure, doctor, module (scheduler, check in, etc). They may be to remind the patient or staff.

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Another option is **User Defined Columns**. They are defined by procedure. They appear on the right of the schedule window and take a response. The response can be required. For example, perhaps one is to remind patient to bring insurance card. If a response is required, staff cannot complete scheduling until they mark give a response to the note.

### Appointment Display

11:00 A - 11:15 A	
11:15 A - 11:30 A	Jeffords, MARY (PT00002527) DOB: 10/24/56 - Follow-Up
11:30 A - 11:45 A	<b>U</b> Mollet, MARY (PT00002231) DOB: 08/08/45 - EKG
11:45 A - 12:00 P	Evaluation
12:00 P - 12:15 P	(B) LUNCH By: system Date: 12/18/2007

The display is color coded. The background color identifies the procedure (see Setup > Schedule > procedure). The font color shows the appointment status (see Setup > Schedule > Color) such as confirmed, checked in, etc. The status is also given by the letter: U for unconfirmed, B for blocked, etc. The bottom of the schedule has a legend for the status (both font color and letter are explained)

Available time slots have a white background or a colored background if they are reserved for certain procedures. For example, in the above screen shot, the time slot from 11:45 to 12 is available for evaluations but not any other procedure.

### NOTES:

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## Understand Right Click Schedule options

Add...	Ctrl+N
Doublebook...	
Edit...	Ctrl+E
Delete	Ctrl+Del
Find...	Ctrl+H
Cut	Ctrl+X
Paste	Ctrl+V
Confirmed	
Unconfirmed	
Missed	
Canceled By Patient	
Canceled By Doctor	
ReSet to Active	
Block/Reserve Slot...	
Unblock/Unreserve Slot...	
Multi Block/Reserve...	
Add to Appt. Waiting...	
Authorization Status...	
Forms (To Be Filled)...	
Multiple Letters (Schedule)...	
Driving Direction...	

These are the different actions that you can select every time you right click a certain time slot or click on this button

**Option** which is located in the lower right corner of the scheduler window. Either option will give the same actions.

### Available Options:

- Add a patient (aside from double clicking on the time slot).
- Doublebook the doctor's schedule.
- Edit an appointment.
- Delete an Appointment.
- Cut an appointment to move to a different day.
- Confirmed/Unconfirmed an appointment.
- Mark as Missed the appointment (preferable at Check in/out module).
- Canceled By Patient.
- Canceled By Doctor.
- Block/Reserve a single slot.
- Multi Block/Reserve time slots.
- Add Appointment Waiting.
- Select forms to be filled out.
- Print multiple letters and send it away to multiple scheduled patients.
- Driving Directions uses the office and patient address in the system to get directions from map quest or yahoo.
- Select means that when another activity is opened, this patient will populate automatically.

### NOTES:

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## Understand Right Click Patient options

Patient		Appointment...
Add...	Ctrl+N	Contact...
Doublebook...		Face Sheet...
		Chart Request...
Edit...	Ctrl+E	Chart View
Delete	Ctrl+Del	Picture...
Find...	Ctrl+H	Signature...
Cut	Ctrl+X	Insurance...
Copy	Ctrl+C	Insurance URLs
Paste	Ctrl+V	Bill...
		Statement...
Confirmed		Outstanding...
Unconfirmed		Financial History...
		Ledger...
Missed		Statement History...
Canceled By Patient		
Canceled By Doctor		Prescription...
ReSet to Active		Prescription Refill...
		Document...
Block/Reserve Slot...		Note...
Unblock/Unreserve Slot...		Reminder...
Multi Block/Reserve...		Fax Sent...
		Letter (Schedule)...
Add to Appt. Waiting...		Print Patient Label
Authorization Status...		
Forms (To Be Filled)...		Case...
Multiple Letters (Schedule)...		Edit...
Driving Direction...		
Add Visit Note		
Select Test, Michael (PT00000175)		

These are the different patient options. It helps you to access other modules or any information related to the particular patient. Patient options can also be accessed if you see this icon



in any window. We call this icon "Wally".

Patient Options include the following:

- Contact information,
- Billing info
- Prescription
- Documents
- Letters
- Case
- Notes
- Edit patient demographic details
- and more...

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## Double book appointments

To double book an appointment, right click on the desired time slot then select “doublebook”. A schedule entry window will open. Enter patient name, procedure, etc... The system will prompt the user that the schedule is already defined at this time and will ask if you want to continue. Click “yes”.

08:00 A - 08:15 A			
08:15 A - 08:30 A	Test, Elizabeth (PT00000174)	Patient	510-232-1456
08:30 A - 08:45 A	Test, Test (PT00000171)	Add... Ctrl+N	908-452-1563
08:45 A - 09:00 A		Doublebook...	
09:00 A - 09:15 A			
09:15 A - 09:30 A		Edit... Ctrl+E	

After double booking, the letters “DB” will appear which indicates that this time slot has been double booked. You can double book as many time slots as you want.

08:00 A - 08:15 A			
08:15 A - 08:30 A	Test, Elizabeth (PT00000174) DOB: 12/25/78 Zip: 90210 - Follow-Up	510-232-1456	DB
08:15 A - 08:30 A	Test, John (PT00000110) DOB: 05/14/83 Zip: 70160 - Blood Test	510-232-4564-8413	DB
08:30 A - 08:45 A	Test, Test (PT00000171) DOB: 08/27/80 Zip: 07036 - New Patient	908-452-1563	

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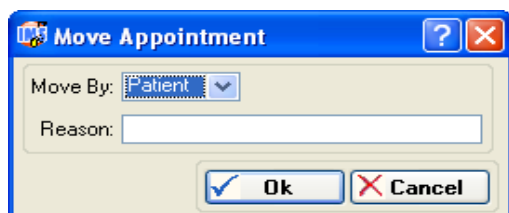


## Reschedule appointments

### Drag and Drop or Cut and Paste

08:00 A - 08:15 A	
08:15 A - 08:30 A	Test, Elizabeth (PT00000174) DOB: 12/25/78 Zip: 90210 - Follow-Up 510-232-1456
08:30 A - 08:45 A	Test, Test (PT00000171) DOB: 08/27/80 Zip: 07036 - New Patient 908-452-1563
08:45 A - 09:00 A	
09:00 A - 09:15 A	
09:15 A - 09:30 A	
09:30 A - 09:45 A	Test, Patient - Blood Test
09:45 A - 10:00 A	
10:00 A - 10:15 A	Test, Jayson (PT00000173) DOB: 07/26/84 Zip: 50158 - EKG - Room 2 P 510-326-4566
10:15 A - 10:30 A	
10:30 A - 10:45 A	
10:45 A - 11:00 A	
11:00 A - 11:15 A	
11:15 A - 11:30 A	
11:30 A - 11:45 A	
11:45 A - 12:00 P	
12:00 P - 12:15 P	
12:15 P - 12:30 P	
12:30 P - 12:45 P	
12:45 P - 01:00 P	Test, Tina (PT00000099) DOB: 01/03/75 Zip: 00544 - checkup 032-645-2325-3253
01:00 P - 01:15 P	Test, Randy - consultation
01:15 P - 01:30 P	
01:30 P - 01:45 P	
01:45 P - 02:00 P	
02:00 P - 02:15 P	
02:15 P - 02:30 P	

To move an appointment within the same date, click and drag the specific appointment. While dragging, this icon will show . When you place the appointment on the new time slot, a message will prompt the user to put the reason for why the appointment was moved. It is not required to put a reason, but this will be recorded on the patient appointment history. This will help you track the patient appointment history as well.



From the move appointment window, you can select who moved the appointment, the doctor or the patient. This option can be set in a particular parameter according to the user preference.

Setup> Scheduler> Parameters> Ask reason when move appointment = Yes/No.

To cut an appointment, right click and select "cut". Go to the desired time slot then right click and paste. The move appointment window will appear if you have set this in your parameter. Cutting an appointment is applicable if you transfer your appointment to another date.

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08:15 A - 08:30 A	Test, Elizabeth (PT00000174) DOB: 12/25/78 Zip: 90210 - Follow-Up
08:30 A - 08:45 A	Test, Test (PT00000171) DOB: 08/27/80 Zip: 07036 - New Patient
08:45 A - 09:00 A	Test, Jayson (PT00000173) DOB: [Patient]
09:00 A - 09:15 A	Add... Ctrl+N
09:15 A - 09:30 A	Doublebook...
09:30 A - 09:45 A	Test, Patient - Blood Test
09:45 A - 10:00 A	Edit... Ctrl+E
10:00 A - 10:15 A	Delete Ctrl+Del
10:15 A - 10:30 A	Find... Ctrl+H
10:30 A - 10:45 A	Cut Ctrl+X
10:45 A - 11:00 A	Copy Ctrl+C
11:00 A - 11:15 A	Paste Ctrl+V

## Copy Appointments

To copy an appointment, right click and select “copy”. Go to the preferred time slot, right click and select paste. The schedule entry window will show, then click on “Ok” if there are no changes.

08:15 A - 08:30 A	Test, Elizabeth (PT00000174) DOB:	Patient
08:30 A - 08:45 A	Test, Test (PT00000171) DOB:	Add... Ctrl+N
08:45 A - 09:00 A	Test, Jayson (PT00000173) DOB:	Doublebook...
09:00 A - 09:15 A		Edit... Ctrl+E
09:15 A - 09:30 A		Delete Ctrl+Del
09:30 A - 09:45 A	Test, Patient - Blood Test	Find... Ctrl+H
09:45 A - 10:00 A	Test, Tina (PT00000099) DOB:	Cut Ctrl+X
10:00 A - 10:15 A		Copy Ctrl+C
10:15 A - 10:30 A		Paste Ctrl+V
10:30 A - 10:45 A		

## Change the status of an appointment

### Missed

Missed
Canceled By Patient
Canceled By Doctor
ReSet to Active

To mark the appointment as Missed, right click and select “missed”. A pop up box will show and ask if you are sure you want to set the status as “missed”. If the user selects yes, then a letter “M” will display before the patient name on the scheduled appointment time slot. To set the status back to normal, right click and select “Reset to Active”.

08:15 A - 08:30 A	<b>M</b> Test, Elizabeth (PT00000174) DOB: 12/25/78 Zip: 90210 - Follow-Up
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## NOTES:

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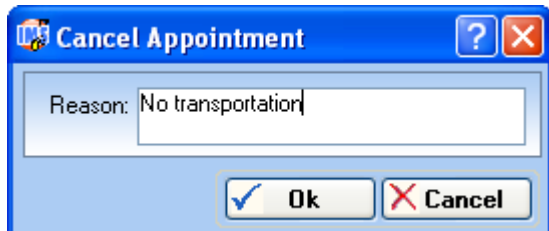


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## Canceled by doctor/ patient

Missed
Canceled By Patient
<b>Canceled By Doctor</b>
ReSet to Active

To cancel an appointment by the patient or doctor, right click and select the appropriate option. A cancel appointment box will show and the user can put a reason on why it was canceled.



A screenshot of a 'Cancel Appointment' dialog box. It has a blue title bar with a question mark icon and a close button. The main area contains a text field labeled 'Reason:' with the text 'No transportation' entered. At the bottom are two buttons: 'Ok' with a checkmark icon and 'Cancel' with a red X icon.

A letter P before the name indicates canceled by patient and letter D means canceled by the doctor.

08:30 A - 08:45 A	<b>P</b>	Test, Test (PT00000171) DOB: 08/27/80 Zip: 07036 - New Patient
08:45 A - 09:00 A	<b>D</b>	Test, Jayson (PT00000173) DOB: 07/26/84 Zip: 50158 - EKG - Room 2

## Confirmed/unconfirmed

<b>Confirmed</b>
Unconfirmed

If the status is marked as unconfirmed by default, and the user wants to change it to confirmed, right click and select confirmed.

A message will appear and ask if you are sure that you want to set the appointment as confirmed. Just select yes to confirm the appointment.

09:45 A - 10:00 A	Test, Tina (PT00000099) DOB: 01/03/75 Zip: 00544 - checkup
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The color of the text will change according to the text color that you set under "confirmed" status.

## Block appointment times

Block/Reserve Slot...
Unblock/Unreserve Slot...
<b>Multi Block/Reserve...</b>

To block a single time slot, right click and select "Block/Reserve Slot". A box will appear and will allow you to put the reason for blocking. For blocking more than one slot, right click and select Mutli Block/ Reserve.

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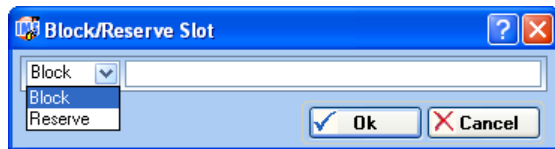
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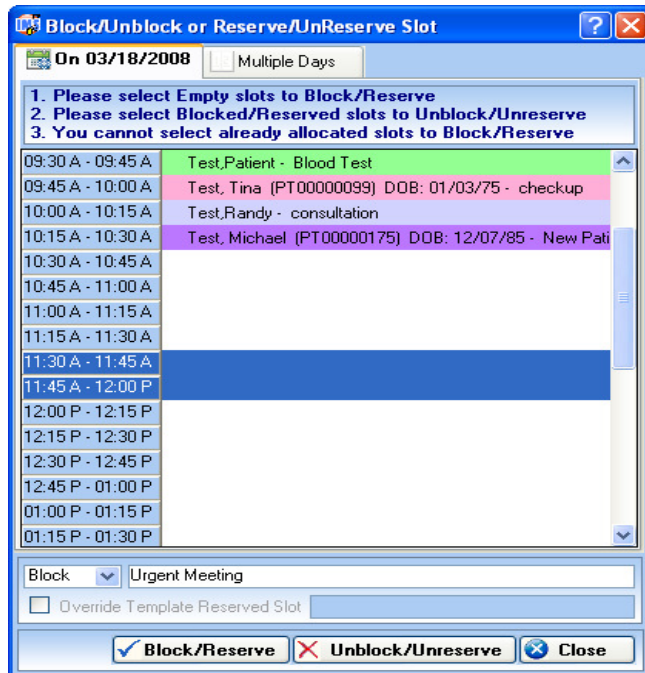
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For single block or reserve window.



This window will show for multi block/reserve. Select on the time slots that you wish to block or reserve. Selected time slots will be highlighted. You can choose either Block or Reserve. To block a time slot, put a reason for blocking the time and click on this button

**Block/Reserve**

To unblock the blocked or reserved time slot, right click then select unblock for single block. For multi block, right click then select the block time slots and click on

**Unblock/Unreserve**

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## Reserve appointment times

Office: 0001 - Meditab Office

**Date Range:**  
 From: 01/01/2008 To: 01/01/2009

**Slot(s):**  
 12:00 PM To 01:00 PM

From: 00:00 AM To: 00:00 AM

Add

Delete

**Block/Unblock:**

☒ Every Day  
☐ Every Week  
☐ Every Month  
☐ Every Year

To reserve an appointment for multiple days, right click and select multi days. Set the Date range and the time interval then click on the “add” button. The time slot will show in the Slot box. You can select different options depending on the frequency of reserving it. It could be every day, every week or alternate by week and so on. Select Reserve on the dropdown list and select a procedure. Click on block/reserve button.

## Look up patient future and past appointments

To check the patient appointment history, right click on the particular patient then go to patient options and select “appointment”. This will open the patient appointment window for the particular patient.

09:00 A - 09:15 A Test, William Patient Appointment...

Patient Appointment(s)									
Patient (?) Test, William (PT00000177)			<input checked="" type="checkbox"/> With other detail and walk in						
S	Date	Time	Doctor	Office	Procedure	Room	Status	Note	Appt. Created Date/By
Test, William (PT00000177)									
1.	03/18/08	09:00 AM	Smith, Larry	0001	Blood Test				03/18/08 / system
2.*	03/04/08	11:54 PM	Smith, Larry	0001	checkup	Room 1			03/18/08 / system
3.	02/26/08	08:30 AM	Smith, Larry	0001	Follow-Up				03/18/08 / system
4.	02/18/08	11:30 AM	Smith, Larry	0001	checkup			Patient asked to move appt. from 02/18/08 at 10:00 AM. Reason: No transportation [system-03/18/08]	03/18/08 / system

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This window will give you the past and future appointments for the patient and will also show any walk in visits.

If a patient calls and asks when his/her next appointment is, to find it just click on the icon . It will open the patient appointment history. Enter the name of the patient first then press the tab key.

Patient (?)

Select the correct patient then hit ok. It will display the past and future appointments for the patient.

Check the box beside this option ☒ With other detail and walk in in order to view other details like walk in visits and so on.

## Schedule Options



The **Option button** located at the bottom right of the **Main Schedule Screen** lists some of the same features you will find when right clicking on an appointment slot.

## Adding Patient to Appt. Waiting:



Click on the Options button located at the bottom right and choose **Add to Waiting List**.

Enter patient, contact information, notes, etc for patients waiting for appoint.

Click on the **Appointment Waiting** box (located in the lower right corner) to open the list of patients waiting for an appointment. To schedule, drag an item to a time slot or right click and Set to selected slot. Other right-click options include adding, editing and deleting patients to and from the list.

Waiting for Appointment

Called Date: 10/30/2007 Office: 00001

Room:

Patient\* (?)

Case:

Contact No:

Preferred Time: Days:

Procedure:

Note:

Ok Cancel

Waiting for Appointment

Smith, GEORGE (PT00001919)

Pref.: Morning

Called: 10/05/07

Off:

Context Menu:

- Add...
- Edit...
- Delete
- Set to selected slot
- Form (To Be Filled)...
- Patient

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**Top Bar Icons functions are:**



**Search** icon brings up an additional appointment window with the “FIND time slots” active at the bottom left.

**Print** icon allows user to print appointments from this screen.



**Arrows left / right** allows user to scroll up and down the screen.



**Patient** icon brings up the Patient Appointment Window, allows user to search for specific patient and view past and future appointments. This ability will enable the user to quickly check a patient's appointment.



**Clipboard** icon -- Appointment by Visit Status Report



**Paper with blue arrow** -- export to PDA



**Refresh** clicking on this icon will refresh the appointment screen



**Parameters** -- this icon will display the Scheduler Parameters

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## Parameters

System Parameters are shown below:

The screenshot shows the 'Parameters' window with a tree view on the left containing 'System Parameters' and 'Schedule'. The 'Schedule' parameter is selected, displaying a list of parameters and their values in a table. At the bottom, there is a 'Parameter Help' section with explanatory text and bullet points.

Parameter	Value
» IVR appointment reminder	No
Show doctors, who are assigned to room	No
Show patient DOB in appointment list	Yes
Show patient appointment with other detail and walkin	Yes
Print patient balance in daily view print	Yes
Is case required?	No
Appointment Card	None
Open multiple schedule screen	No
Show patient Zip in appointment list	No
Allow to create visit note from scheduler	No

**Parameter Help**

You can specify to remind appointment for the patient in Patient Master.

- If this Parameter is set to **Yes**, then in Patient Master screen **Appointment call** field is enabled. You can set reminder for the appointment.
- If this parameter is set to **No**, then in Patient Master screen **Appointment call** field is disabled. You cannot set reminder for the appointment.

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User Parameters are shown below:

Parameter	Value
» Allow double book appointment	Yes
Allow to change visit status from check in/out	Yes
Days of appointment to synch with Outlook	1 Day
Default Status	All
Outlook reminder for appointment	Yes
Set Default Doctor in Check In/Out	Gonzalez, Denise
Set Default Doctor in Scheduler	Gonzalez, Denise
Show appointment list	Yes
Show default doctor from User parameter	No
Show NOT checked in patient only in appointment list	No

**Parameter Help**

You can specify to allow double booking of appointment for the same time slot.

- If the Parameter is set to **Yes**, then system allows to double book appointment for same time slot. In **Scheduler** screen Doublebook is enabled.
- If the Parameter is set to **No**, in **Scheduler** screen Doublebook is disabled. You cannot double book the

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## Creating a New Patient

To create a new patient through the Patient Master from the Schedule entry window, click on the button “Add Patient” and the Patient Master screen will pop up.

Enter the patient demographic details and fill out all the fields that have an asterisk (\*). The system will not allow the user to complete the patient registration if there is missing information in one of the required fields.

## With creating a new patient chart

## NOTES:

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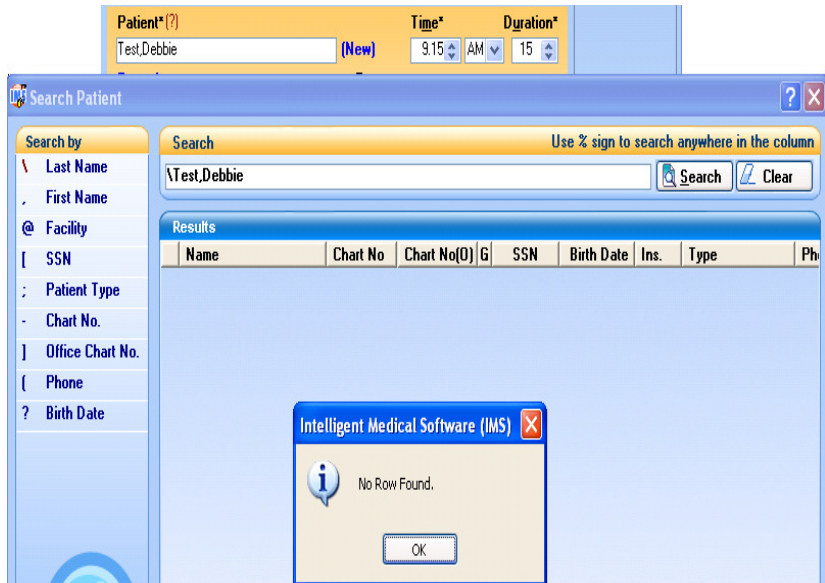
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After you have saved the new patient through the Patient Master window, a chart number or patient chart will be assigned to that particular patient. The chart number is auto generated by the system. The Patient chart will be displayed beside the name of the patient.

## Without creating a chart

When a user tries to add a patient that does not yet exist in the database they will be directed to the Search Patient screen a “No Row Found” will show, click on “Ok” then hit “Cancel”. There will be no patient chart number beside the patient name and an indication “new” appears next on the patient name field.



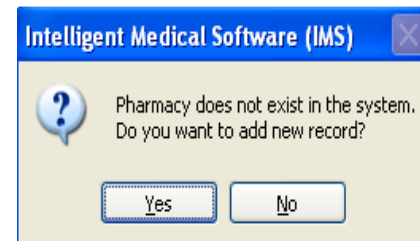
## Enter a New Patient Details

### Pharmacy

The patient's pharmacy can be entered from the Patient Master window. The advantage of this is when the doctor has already created a prescription for the patient; this pharmacy will be defaulted from the prescription window.

If that pharmacy is not yet listed in the database, type the pharmacy name then hit tab. This box prompts. Click Yes.

The Patient Master window will open. Enter the pharmacy details like address, phone number, fax number and etc.



## NOTES:

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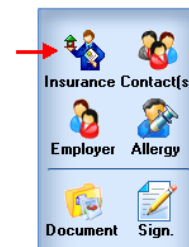
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## Insurance

Patient Insurance can also be entered from the Patient Master screen. Just click on this icon and the Patient Insurance window will be displayed. Fill out the required fields. Click Save.



## Assign Insurance at the time of scheduling

From the Schedule Entry screen, patient insurance can be entered. Double click anywhere in this area and the Patient Insurance window will show.

Pt. Insurance(s)	ID	Priority	Start Date	End Date

[Send Inquiry](#)   [Eligibility History](#)

## Contacts

Picture
Appointment Call
Glucose Meters
Patient 1 of 1

Paper Chart Office: 0001
Doctor: Smith, Larry

Insurance
Contact(s)

Type\*
Contact Person\* (?)
Note

1. Bill To	Test, Joseph	spouse insurance card
2. Emergency Contact *	Test, Joseph	spouse

Add
Delete
Cancel
Save
Close

When the user clicks on the icon "Contacts", it displays the Patient Contact screen. This allows the user to add a contact type like Emergency Contact.

If the patient statement will go somewhere else, the Bill To contact type is essential. This person should receive the patient statement.

## NOTES:

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Next choose the **procedure**, **doctor/room**, **case** and **authorization** number (if required).

From this screen you can: mark the appointment as **confirmed**, fill out authorization information, view patient detail and more.

See separate training guide on Authorization for details on that module. Required authorizations are setup based on insurance and procedure.

Within IMS, the **Case** holds important billing and authorization information. For example, within the case keep track of the number of visits under a certain authorization. Or use a special case for all visits related to workers compensation. For general sick visits, only one default case is necessary. But for visits with different insurance, referrals or other information, create a new case to use for that group of visits.

### Understand Cases in IMS

To create a case, click on this button  **Case** on the schedule entry screen. Another way to access the case master screen is to click on the patient button  **Patient** from the appointment window.

Case No.* CS00000335	Active: <input checked="" type="checkbox"/> Is Private? <input type="checkbox"/>
Office* 0001	Doctor* Smith, Larry
Case Type* Work Compensation	Start Date* 03/11/2008
Description* WC left shoulder 031108	Injury Date: 03/11/2008
<b>Hospital &amp; Facility:</b>	
Hospital (?)	Facility (?)
Room:	From: 00/00/0000 To: 00/00/0000 Discharge: <input type="checkbox"/>
<b>Referred By:</b>	
By (?)	Date: 00/00/0000 Source:
Ref. Emp(?)	Utilization Review:
<b>Referred To:</b>	
To (?)	
Note:	

The case record stores many common billing details about a particular illness or occurrence for the patient, so you do not need to enter the same information again and again each time new charges are posted during their treatment.

You can select case type such as Illness, Personal Injury, Workers Comp or Physical insurance.

### NOTES:

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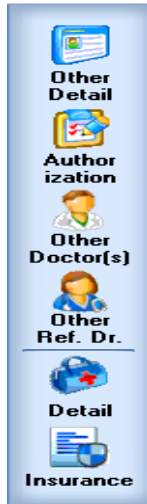
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The case also allows user to enter authorization details for each case and to keep track of the history such as how many visits have already been used, authorization expiration date and etc.

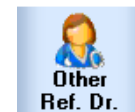



The Case allows user to enter Personal Injury or Worker Comp insurance information in the case record. These payers may be different from the Patient's insurance coverage. So if the patient visits you for a personal medical problem as well as a work injury problem, then you need to be careful to select the proper insurance payer for charge posting, depending on the nature of the visit or treatment. The ability to create multiple cases to cover such situations allows you to easily provide the correct information when posting charges for a specific visit.

You can also enter information about other doctors involved with the patient's case

### Enter Referring physicians

You can enter referring physicians from the Case screen then click on this icon.



From the Patient Insurance window, click this  **Add** button to add another patient insurance. You can directly edit the patient insurance details as well, especially the start date and the end date field. Always click on "save" to overwrite the previous details. **Add/edit patient insurances**

**Patient Insurance** [?] [X] Insurance 1 of 1

Active: ☒ Scan Card

Insurance\* (?) Blue Cross Payment Plan (BSCP) BSCP ID# 68787878989 Ins. Type Code: [v]

Group No.: [ ] Group Name: [ ] Temporary Medicaid: ☐ Priority: Primary [v]

Start Date: 00/00/0000 End Date: 00/00/0000 Relation: Self [v] Insured By (?) [v]

Copay Type: Amount [v] General: .00 [v] Speciality: .00 [v] (Copay) Aid Code: [v]

Accept Assign: ☒ Cross Over: Default from Insurance [v]

Adjuster: [ ]

Note: [ ]

Insurance Note: [ ]

Last Check Eligibility: [ ] Result: [ ]

[Send Inquiry](#) [Eligibility History](#)

[<<] [<] [>] [>>] [List] [Copy] [Add] [Delete] [Cancel] [Save] [Close]

### NOTES:

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